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ABSTRACT

Recognizing that there are numerous organizational models and strategies that can be used by Montessori school administrators, this handbook provides a guide for shaping the Montessori school's unique administrative practice. The handbook's seven parts address organizational and financial foundations, a developmental perspective of the prepared environmental and architectural design, family-school relationships, building a professional community, whole-school development and evaluation, growth and sustainability, and special concerns of the public school. The chapters are: (1) "Brief: Starting a New Montessori School"; (2) "Organizational Structure"; (3) "Financial Operations"; (4) "Implementing the Developmental Continuum"; (5) "The Architectural Expression of the Developmental Continuum"; (6) "School Promotion and Recruiting"; (7) "Admissions, Enrollment, and Family Records"; (8) "Parent Involvement and Guidelines"; (9) "Hiring and Orientation of Staff"; (10) "Operational Policies and Procedures"; (11) "The Cycle of Evaluative Inquiry between Child and Teacher"; (12) "The Cycle of Evaluative Inquiry with School Staff"; (13) "Fundraising, Annual Giving, and the Annual Report"; (14) "Capital Campaigns"; (15) "Long-Range Planning"; and (16) "Montessori in the Public School." Each chapter includes answers to frequently asked questions about the topic, suggestions for further reading, and sample documents related to the topic. Four appendices describe the prepared environment at the infant-toddler, preschool, and elementary levels, provide materials lists, and delineate additional resources. (KB)

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THE WHOLE-SCHOOL MONTESSORI HANDBOOK

For Teachers and Administrators

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by
David Kahn
Sharon L. Dubble
D. Renee Pendleton

THE WHOLE-SCHOOL MONTESSORI HANDBOOK

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Sharon L. Dubble
D. Renee Pendleton

North American Montessori Teachers' Association
Cleveland, Ohio • 1999

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NAMTA
11424 Bellflower Road
Cleveland, OH 44106
216-421-1905
fax 216-421-8193
staff@montessori-namta.org
www.montessori-namta.org

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Preface

NAMTA is pleased to present this, its third handbook of Montessori implementation. This compilation of school practices once again demonstrates the individuality of Montessori school approaches, which is nothing less than a gift of diversity. As in the past, this handbook culls the best practices from Montessori schools throughout North America, presenting actual documents for a reality-based look at school operations.

In addition to practical approaches, this handbook endeavors to incorporate Montessori ideals, attaching vision to vital practical detail. *The Whole-School Montessori Handbook* brings forth a philosophical view of school organization that is set forth in its introduction and relevant to all users of the school.

The Whole-School Montessori Handbook strives to present up-to-date principles and practices of Montessori implementation in a user-friendly format. In addition to thumb tabs for each chapter and detailed page headers, we have included the following special features:

- Close-Up: detailed information on points made in the main text.
- FAQs: frequently asked questions on chapter topics.
- Further Reading from NAMTA: a list of NAMTA journal articles and other resources available from NAMTA, given at the end of each chapter.
- Sample Documents: actual documents collected from schools throughout North America to illustrate common practices in Montessori.
- FYI: reprinted articles, usually from the NAMTA archives, that provide more in-depth background reading on topics covered in the chapter.
- Resources: print, video, Internet, and organizational resources; look for these in boxes near relevant topics in the text, as well as a comprehensive list in Appendix 4.

Sharon Dubble and I have collaborated over the years on several Montessori administration courses at NAMTA's summer Montessori Academy. While including the nuts and bolts of budgets, capital campaigns, promotions, etc., the main premise of the course was to present the Montessori learning community as a management challenge like no other. The Montessori school was described as a living organism, a thesis Sharon had mapped out over time into a very sophisticated philosophical perspective. This thesis, combined with my own focus on "developmental continuum" and evolving schools, gives *The Whole-School Montessori Handbook* a holistic view of school operations, now organized around a structure based on organic growth and development. This truly vital organization relies on Sharon's extraordinary ability to envision and articulate so that this difficult idea may be made more accessible.

Sharon is an administrator for the Master of Education degree with Montessori specialization at Loyola College in Maryland (Baltimore). She holds AMI Primary and Elementary diplomas as well as a Ph.D. in educational philosophy.

Renee Pendleton, NAMTA's Director of Communications, is responsible for NAMTA's success on the Internet, for developing the NAMTA archives and its related database, and for improving and mechanizing production of *The NAMTA Journal*. Her diligent work on this handbook focuses on the classification of detail. Thousands of pages of submissions were organized in a database, connected to topics, and then set up for comparison and analysis. Her attention to detail and editorial integrity have raised the standard of graphics and organization of the handbook to allow for convenient access to all of its contents.

Production of this book was dynamically assisted by the artistic skills of NAMTA's staff designer, Emma Mendenhall, who also performed the labor-intensive work of scanning and layout.

NAMTA cannot take on projects of this magnitude and distribute them to members without the help of The Hershey Foundation. The Hershey Foundation (Kirtland Hills, OH) has supported all NAMTA media works in recent years, and its president, Debra Hershey Guren, takes a keen interest in nurturing and developing Montessori initiatives at the cutting edge that will bring the whole school to its final stages of development.

This book would not have been possible without the contributions of the schools listed at right. Their sample documents and policies provide a practical foundation for school operations and development.

Many thanks to the manuscript reviewers, John McNamara (Ruffing Montessori School, Rocky River, OH), Jacquie Maughan (Pacific Crest School, Seattle, WA), Deborah Bricker (Hershey Montessori School, Concord Twp., OH), and Jeanne Fleischhacker (South Suburban Montessori School, Brecksville, OH), for their hours of painstaking reading and thorough commentary. Special thanks also to our proofreader, Professor Deborah Workman of David N. Myers College (Cleveland, OH).

Appreciation for their contributions to Chapter 5 goes to Claudia Castro, Dieter Lutz, and Victor Sidy of Taliesin Architects (Spring Green, WI, and Scottsdale, AZ); Tyler Smith, FAIA, of

Contributing Schools

Aidan Montessori School
Washington, DC

Austin Montessori School
Austin, TX

Denison Montessori School
Denver, CO

Forest Bluff School
Lake Bluff, IL

Franciscan Montessori Earth School
Portland, OR

Gladwyne Montessori School
Gladwyne, PA

Henson Valley Montessori School
Temple Hills, MD

Hershey Montessori School
Concord Twp., OH

Interdistrict Montessori School
Hartford, CT

Lake Country School
Minneapolis, MN

Lakemont Academy
Dallas, TX

Lexington Montessori School
Lexington, MA

Metropolitan Montessori School
New York, NY

Milwaukee Montessori School
Milwaukee, WI

Montessori Adventure Schools, Inc.
Appleton, WI

Montessori Center of Oak Ridge
Oak Ridge, TN

Montessori School of Lake Forest
Lake Forest, IL

Montessori School of Northern Virginia
Annandale, VA

Montessori School of Pullman
Pullman, WA

Montessori School of Raleigh
Raleigh, NC

North Avondale Montessori School
Cincinnati, OH

Northwoods Montessori School
Atlanta, GA

Old Brooklyn Montessori School
Cleveland, OH

Pacific Crest School
Seattle, WA

Rock Prairie Montessori School
Janesville, WI

Ruffing Montessori School
Rocky River, OH

Ruffing Montessori School East
Cleveland Heights, OH

Santa Barbara Montessori School
Santa Barbara, CA

St. Alcuin Montessori School
Dallas, TX

Staunton Montessori School
Staunton, VA

Tall Pines School
Brampton, Ontario

Tempe Montessori School
Mesa, AZ

The Cobb School, Montessori
Simsbury, CT

The Montessori Community School
Scituate, MA

The Montessori Farm School
Huntsburg, OH

The Montessori Institute Children's House
Denver, CO

The Montessori School
Kalamazoo, MI

The Montessori School
Wilton, CT

The Post Oak School
Bellaire, TX

Webster Montessori School
Webster, NY

West Hills Schools Inc.
Portland, OR

Woods Middle School
Houston, TX

Smith Edwards, Architects (Hartford, CT); and Steve Lawrence of Carrick Howell and Lawrence Architects (London, England).

AMI trainers Jean Miller (Elementary) and Judi Orion (Assitants to Infancy) have made major contributions to this book in the form of environment descriptions and materials lists for the infant-toddler, preschool, and elementary levels. Appendices 1 through 3 are particularly valuable resources for the administrator and teacher, for which Jean and Judi are owed a debt of gratitude.

Other contributors include Walter & Haverfield, P.L.L.; Laura Morris; Lili Peller (by permission of The Philosophical Library); Sandra Westcott; Nancy Hildick; Independent School Management, Inc.; Annette Haines; Midwest Montessori Training Center; Mark Fish; and Robert Peterkin.

Finally, my gratitude to the NAMTA membership, who waited patiently for this book, and who stay with NAMTA year after year in spite of a few irregularities about certain deadlines.

David Kahn
Executive Director, NAMTA

THE WHOLE-SCHOOL MONTESSORI HANDBOOK

for Teachers and Administrators

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Evolving Schools

An Organic Approach to Montessori Administration

What is it that makes a school "Montessori"? What we have come to call Montessori education is a complex of philosophy, psychology, educational theory, and instructional materials. Yet the essence of Montessori is a vision of the child in society–an understanding of human development that demands a new view of education. Maria Montessori clearly saw education as much more than merely the transmission of knowledge. Rather, she re-envisioned the purpose of education as aiding the full development and release of human potentialities.

In other words, "Montessori" is about life–about development and human evolution. Its purpose is not to transmit a specific curriculum; rather, the curriculum emerges from understanding and working with the natural laws, or key principles, of human development. During her lifetime, Maria Montessori was able to articulate these principles and translate them into specific prepared environments.

But Dr. Montessori did not provide specific blueprints or models for developing schools. And she left us no standard set of guidelines for school organization and certainly no prescribed training for Montessori administrators. Yet for a school to embody the essence of Montessori, it must be more than a collection of Montessori classrooms managed effectively. The school itself must be about life–and reflect the process of human development.

There are numerous organizational models and strategies that can be used by administrators of Montessori schools. However, we suggest that to wholly participate in Dr. Montessori's new vision of education, we need to re-envision the Montessori school itself–not primarily as an educational institution to be built and managed, but rather as a living, evolving organism. As we begin to think and see more organically, we evolve administrative practices that lead toward more fully integrated, living Montessori communities. By focusing our vision first on the essential principles of human development, we become better able to enhance the development of human potential in all aspects of the school.

These key principles can be thought of as the "genetic material" of the Montessori school organism–the inherent directives that determine basic characteristics and endow potentialities. But the full manifestation of attributes and behaviors–the "personality" of the school–occurs through a continuous reciprocal interaction of this genetic "raw material" with the forces and opportunities in the environment. In this organic view, there can be no one organizational blueprint for Montessori schools. Each school, to some degree, manifests itself uniquely in its evolution. However, we do believe that there is a common "genetic core"–some common guidelines for evolving Montessori schools.

What forms the genetic core of a Montessori school? What are the key principles, the natural laws, for evolving a living community where potential is released? Although there could be arguments for various listings, we focus on three principles that are highlighted in all the writings of Dr. Montessori as being essential to the process of human development–and, we believe, to the development of Montessori schools:

- Development occurs in stages.
- Development is interactive.
- Development is integrated.

Development Occurs in Stages

Montessori vision is a whole vision, whereby the human personality comes into full engagement and self-realization nurtured by successive prepared environments that correspond to successive stages and sub-stages of life–0-3, 3-6, 6-9, 9-12, 12-15, and beyond. From an administrative standpoint, assimilation and integration are needed when a school expands from preschool to lower elementary, from lower elementary to upper elementary, from upper elementary to adolescent level. Along the way, physical education, art, and music become parent issues; all-day Montessori programs become life necessities; academic accountability becomes more and more pressing. When schools become larger, administration may need to expand.

As the school expands from serving one stage of development to serving many stages of development, it is *evolving* from more simple to more complex. Natural selection allows the school to select what works, administratively speaking. But the Montessori school's evolution is not random; it is governed by the Montessori vision of what a child can become, what Maria Montessori described as the "new child." The "new child" represents the aim of the school's evolution. That brings us back to the vision of the whole–whole school and whole child. It is the vision of the whole child that unifies the school, integrates its increasing complexity of more prepared environments at different levels, increased specialties, more personnel, the need for an expanding physical plant, etc. It is the vision of the growing child, growing teacher, growing parent, and growing administration, along with the growing physical space, that finds its unique coherence in a Montessori school simply because stages of development are the actual blueprint for the school. The school acts, grows, and expands aligned with Montessori's unique understanding of *laws of development.*

By observing and discerning stages of development in the various elements of the school community, we can begin to see some emerging sensitivities, opportunities, and potential pitfalls that characterize certain stages. And just as awareness of stages of development is a key principle in shaping pedagogical practice, so this same awareness can be applied to the developing aspects of Montessori schools.

It has been suggested that Montessori schools themselves go through some identifiable stages in their growth process. Figure 1 suggests some stages of development common to the evolution of Montessori schools, showing how various aspects (finances, parent involvement, etc.) develop and change as the school grows through different stages.

Can we observe stages of development in teachers? Are there some characteristics common to new teachers? What are the needs of teachers who have been in the same classroom more than five years? What are the signs of potential burnout? This book explores how opportunities, structures, professional development resources, and evaluation tools can be shaped to respond to the needs of teachers at different stages.

And how do parents grow? Most new parents are in a sensitive period for information about their child and his or her needs. They are open, vulnerable, and eager to attend meetings, to observe in the class, and to receive information that is immediately applicable to their child. As parents become more experienced, they are less willing to be passive recipients–or to hear the same basic teacher presentations. They want to share more fully from their own experience and participate more actively in discussions about their children and the school. And what about the "mature" parents who have been part of the school for a long time? Do we recognize their need to make meaningful contributions beyond the interests of their own family?

At this point it might be valuable to look at different stages of the school's development.

Stage One: School Beginning

At this stage, the Montessori school and founding teacher are initiated into the school's vision. The excitement of a first-year school is unsurpassed as the Montessori ideal is made real. A founding school board is just discovering what Montessori promises. Parents initiate discussion groups, share the Montessori books, and visit established classrooms. They hire a Montessori teacher and rent a room, perhaps in a church basement. They unpack their materials, bright, shiny, and with an aura of newness. They assemble their school.

The parent board is justifiably proud of its one-classroom school. As the Montessori vision suggests, the first board must always see what is in the state of becoming, in the state of reaching the fullest potential. The first parents must have faith in the child, faith in the teacher, faith in Montessori, and faith in the school's own power to overcome pitfalls and survive. The most important elements for a beginning school are optimism and nurturing. If a young school loses

Figure 1

The Evolving Montessori School

	Stage of School	School Beginning	First Expansion: Elementary	Second Expansion: Long-Range Plan	Program Innovation & Integration (Adolescent)
Administration	Levels of Education	1-2 Preschool Classes	2-3 Preschool Classes 1 Lower Elementary Class	2-3 Preschool Classes 2 Lower Elementary Classes 1 Upper Elementary Class All-Day Montessori	2 Infant Classes 2-3 Preschool Classes 2-3 Lower Elementary Classes 1 Upper Elementary Class All-Day Montessori 1 Middle or Junior High leading to Erdkinder
	Parent Involvement *Pre-Startup: Community Consciousness-Raising, Parent Board*	Parents do accounting, building and grounds, promotion, and consolidate as a Board	Board delegates to administrator/head of school All board functions focus on tuition levels and fundraising Board members continue own education in Montessori pedagogy and philosophy	Board begins capital campaign for building while maintaining annual giving	Board seeks endowment source Board and staff help set new goals for retirement program and school policies
	Administration	Teacher functions as head of school Full- or part-time secretary for support	Full-time administrator or head of school	Board and head focus on long-range plan for projections and expansion	Board, head, and staff update long-range plan through shared vision process
	Financial	Charts of Accounts Deposits tied to admissions Long-range fundraising goals	Small fundraisers Cash reserve Annual giving Spending on consultants and staff attendance at conferences	Five-year projection Capital campaign + annual giving Advance sponsorship of teacher trainees Staff professional development	Tuition increases by grade level Plans toward endowment More benefits for teachers Higher assistants' salaries Some administrative specialization: Director of Development, Admissions Director, Business Manager, etc.
	Building	Rented	Purchases land, looks to expand to fill existing rental facility Intermediate furniture	Begins building—breaks ground Upgrades shelving, offices, grounds, and overall beauty	Specializations—gardens, greenhouses, specialty art, music, and physical education
Program	Teacher Development	*Prepared Environment & Classroom Management* Prepared environment Parent communication Fluency of program—class organization and presentations Goal-setting for personal and professional growth	*Child-Centered* Needs of child Needs of patents Needs of school beyond one's immediate classroom Networking through national, regional conferences	*Renewal* Shared vision of both child & adult development Interest in all planes of education Mentoring—providing leadership for teacher development Looking into Montessori training at levels beyond initial training Implementation: when to innovate, how to feed back Art, music, second language integration Special needs inclusion	***Cosmic Purpose*** Educational reform—Whole Language, Geography for Life, Science for All Americans, horticulture for learning, etc. Advanced intellectual training (master's degree) Teachers lead national, regional workshops
	Teacher Consensus/ Mutual Support	Daily contact, mutual exchange Regular meetings	Interface between primary and elementary Beginning understanding of expectations in the primary Teachers visit classes of other levels	Role of specialty programs: art, music, physical education, second language Upper elementary program design Infant programs and/or all-day Montessori Begin to provide "vision sharing" goals for all planes Each class has a standard set of handmade materials	Adolescent program is formulated Teachers build in-depth understanding about transitions from 0-3, 3-6, 6-9, 9-12, and 12-14 Children of different age levels interact
	Parent Education	What is Montessori? Relationship between home and school Open houses	Classroom materials Why elementary? Reflection of developed program expectations The nature of the child in the family and school	Why Montessori at each level Montessori for adolescents Hands-on introduction to materials of all levels	Stages of development as embodied in Montessori school Adolescent psychology and development Evolving subject areas Pathways to vision

a family, loses its lease, loses its first teacher, the board must not lose sight of the long term. New schools are susceptible to short-term disappointments: tuition shortfall, teacher error, public relations slippage. But a positive board with a vision realizes that its commitment to Montessori will outlast the fickle miscalculations of the present.

What does it really mean to be a child-centered institution? It means to put the hierarchical considerations and power struggles aside and make decisions from the point of view of what is best for the child. In stage one, especially when there is no full-time head of school, what is best for the child may come under debate because there is little distance between the parents and the school. If the board is made up of parents, each member will see the school's decisions from his or her own child's point of view, which is, of course, absolutely the natural approach for parents. Decisions tied to parents' individual insights about their own children are valid for a school to consider. But there are always many points of view when a school is so small as to be wholly democratic. To bring these voices into unison in a young school is a difficult process and requires strong leadership qualities from the Montessori teacher. Whether to purchase an adventure playground or a full map cabinet for the preschool classroom may be a difficult question for the beginning school, which may have minimal resources.

However, there is a unique richness when a school operates at the grassroots level. The teacher becomes exposed to every family's viewpoint. If the teacher can clearly articulate the cause of the child, communicating what the classroom needs and what the children need, then the diverse viewpoints of the parent body begin to become unified. The pioneering teacher has an intensely generative role by necessity. She is giving birth to a school. She is the minister of school culture. It will be fitted to the needs of her students and to her brand of Montessori vision.

If this process goes well, there is a deepening of experiences unique to building a school. The responsibility is felt to the core, and the teacher's commitment is rooted. The direct feedback from the parents in this beginning process bestows an irreplaceable wisdom upon the founding teacher. It is knowledge almost unattainable by teachers who simply inherit a classroom.

The pioneering school transitions sooner or later from a survival mode to a focus on the needs of children and adults engaged in a maturation process. Parent education forms links between the home and school and furthers understanding through discussion groups about children, parents, and teachers and their growing up Montessori.

Stage Two: Preschool Meets Elementary

Many Montessori schools choose to limit their offerings to the preschool level (ages 3-6), providing high-quality Montessori with increasing wisdom as the school matures. Other schools, however, choose to expand into the elementary level for their families who wish to continue the Montessori experience.

Interactive Development in Stage Two

Based upon her observations, Dr. Montessori described another key principle of development–the interactive process. She spoke constantly of the self-construction of the individual. She emphasized that the child is not primarily molded by others; rather, the child builds his or her individual personality through interaction with the environment. According to this principle, then, education is primarily active rather than didactic–with the emphasis upon the child's activity rather than the adult's teaching.

In the same way, we can think of Montessori schools as living entities in the process of self-construction. They are not primarily molded or shaped by the head of school, but rather evolve their unique "personality" through interaction of the various elements of the school environment. In this view of a developing school as it expands from preschool to elementary, professional growth is based on the interactive nature of the school community rather than upon administrative directives.

Interactive development reaches a new level self-awareness when a school introduces the elementary for the first time alongside a preschool class. These two different planes of education need to start understanding one another. Interaction accelerates as preschool and elementary teachers touch base. Questions like these emerge: What quality of handwriting is expected for the elementary? What level of fact memorization? Should all children be reading when they come into the elementary? What about non-academic abilities–to listen, to sit in a group, to share ideas, to take one's turn, to complete a task?

It is not that interactive development only occurs in Stage Two. But interaction speeds up with the introduction of any new plane of education (age level) simply because it *is* new, curious, and unfamiliar. There is then a real necessity for interaction in order to make a smooth transition for the child moving from preschool to elementary. Furthermore, the expansion of the school means that all classrooms must build consensus with regard to the day-to-day operations of the school as well as academics.

The Consensus Approach as Interactive

The tiny consensus discussions come first; the interdependent needs of several classrooms demand coordination. Now, for the first time, two to three classes may require a head of school to resolve the logistics of morning drop-off, playground rules, parent education events, etc. But analogous to the physical coordination of school operations is the Montessori plan for growth and intellectual development–the school's spiritual embryo.

With the introduction of the elementary level, the classroom environment becomes the first discussion of consensus, part of the search for a standard. What handmade materials need to be present? What Montessori hardware needs to be part of every classroom? What can be shared between preschool and elementary? Should the elementary have some of its own "preschool materials"? Then teachers begin to discuss common approaches and similar timing of key presentations, going out, and applications for reading and writing, as they focus on cultural explorations. A collective vision emerges, based again on collective observation of the children in the community.

The consensus process should break down barriers, break down divisions between preschool and elementary. If there are no talks between preschool and elementary teachers, fantasies become expectations. The elementary teachers can become self-righteous about a perceived lack of preparation, creating a "beat the clock" syndrome. The preschool environments can become constricted with inordinate concerns about reading, writing, and math levels. Some common understandings about environments and presentations can add confidence and direction to the evolving program.

The Interface Between the Planes as Interactive

Perhaps some academic specifics will emerge as the elementary program interacts with the preschool. The consistent use of cursive writing, the presentation of the decimal system overview including all four operations, the balance of math memorization versus discovery, the inclusion of grammar exercises, the pervasive role of geography and science, the increasing complexity and continuation of practical life in the elementary are all part of the interface process. An interface process means that there are no divisions for the child between preschool and elementary, only a passage from one stage to the next.

Those Montessori schools that produce expectations and then write them down should not think that the process is finished. In fact, while putting standards in writing may be necessary, especially for new teachers, it is also dangerous. More important is the dialogue around standards. It is talk, talk, and more talk about real details. Consistency of handwriting strokes from class to class, for instance, has some bearing on how children converge on the elementary, especially children who have motor difficulties. The perfecting of the prepared environment and the review of the presentations may be hard to initiate, but they can help establish a community of Montessorians. The key to vitality and shared vision is constant supporting conversations.

With the introduction of the elementary classes and with a larger number of preschool classes, parent education and parent roles also change through the interface process. Still, the parent's first bond is to the teacher and classroom in which his or her child is placed. Yet the expanding school must engage the parent in a commitment that is interactive schoolwide, a commitment to support not only the child in the classroom but the child in the school as a whole. Parents should be encouraged, for example, to support the school through annual giving and building campaigns, not just to send in gifts for the child's individual classroom.

The enrichment of the elementary environment in tandem with the preschool environment results in a symbiotic unison of interactive parts. The "Why Elementary" parent meeting can be presented by preschool and elementary teachers who together demonstrate their understanding of the interactive nature of the planes of education. For instance, the unit bead, the ten bar, the hundred square, and the thousand cube at the preschool level will initiate the forms of point, line, surface, and solid for Euclidean geometry at the elementary level. The names and lore of animals and plants imparted to a four- or five-year-old become the basis of classification at the elementary level. If preschool teachers communicate to families about the interface between preschool and elementary, parents will be eager to enroll their children in the elementary.

The school has matured as the connection of two planes of education inspires a broader understanding of child development between teachers and families, which is communicated through parent education. At the same time, there is greater coordination and goal-setting within all aspects of the school–both pedagogical and practical–for the sake of the child's fluid transition between the planes of education. Agreements and shared consensus about program, curriculum, finances, and yes, policies and procedures make sense in light of the desire for the fullest development of the children and the school. A collective ethic begins to emerge, a sense of wholeness, which is related to the third key principle of development, *integration*.

Stage Three: Integration and the Long-Range Plan

Dr. Montessori's observations led her to conclude that humans have an inner guide–a kind of inner intelligence–that propels growth and guides development. This intrinsic force works toward the full manifestation of potential.

But the direction of this inner guide can only be experienced fully through integration of all the aspects of the human personality: mind, body, emotion, spirit. Only when all parts are integrated and active can an individual move confidently and joyously in taking on new challenges.

Dr. Montessori stressed that we must always address the whole child. Moreover, she warned that personality deviations could occur as a result of addressing the various aspects separately. And she carefully noted that integration is not a static condition, something to be achieved once and for all. In fact, if development is integrated, growth occurs as a series of "points of arrival," a continual unfolding of a whole, healthy personality.

Likewise, Montessori schools need to grow into their full potential and this requires that they maintain an integrated approach. Integration means combining or coordinating separate elements to provide a harmonious, interrelated whole. As society becomes more complex, the web of interrelationships mirrors that complexity. Change in one small element can result in reverberating and often unanticipated changes in other areas. The challenge for Montessori schools is to integrate the increasing complexities in ways that create and maintain wholeness, especially as they come into maturity.

As schools grow, they risk becoming fragmented. After six or seven years of operation, the typical school adds an upper elementary program and begins to look beyond Montessori. Parents projecting ahead to high school call for specialty input: more second language, more physical education, more art, more music. In fact, in schools that command more resources, whole specialty rooms come into existence: art room, music room, gym, etc. A library/media center may be added, taking the books out of the classroom. Finally, someone might even suggest centralization of a science lab, especially if there is more than one upper elementary class.

Integrating Specialties and Specialization

The specialty mania is not necessarily a negative development if the school can keep specialties integrated with the whole. Remember, however, that Montessori education uniquely integrates much of the specialty work. By contrast, the need for elaborate specialties in non-Montessori schools is usually to enrich a bland textbook orientation; creativity works *around* the main curriculum. The project orientation in Montessori programs means, for example, that art can enrich history and geography in very specific ways: Child-created dioramas and artifacts represent animal life, plant life, and the needs of peoples. Music can certainly do the same. One can sing math facts or, for that matter, music can be used to underscore the variety of cultures and their histories. This should not rule out teaching art and music for their own sake, but at the same time, extracurricular art and music should not be so omnipresent that they fight the flow of the Montessori curriculum.

Specialty teachers can make themselves available as visiting resources in the classroom so that the children are not scheduled but have the option to come to the specialty class. This approach avoids fragmenting the learning community by allowing children to retain control of their own uninterrupted time. Itinerant specialty teachers, on the other hand, cannot expand their subject matter to full complexity and must constantly take down and set up work. So careful consideration of the specialty plan and its integration can be part of the teacher consensus process.

The introduction of out-of-balance specialty subjects can seriously compound administrative issues in a school. Parents demand more extravagant facilities. Elaborate art and music rooms push up tuition. Administration must raise funds, so now a director of development is hired as well as a full-time business manager. The intimacy of the pioneer days is now supplanted by a new division of labor in the office. The office space is expanded, and the pedagogical leader is often buried in a new level of intra-staff politics and decision-making that takes him or her away from the teachers, the parents, and the children.

Higher tuition means less of a cross-section of families, less diversity. Moreover, as the school matures and attracts parents who have not been with it from the beginning, it runs the risk of losing the sense of common purpose present at its founding. It must take precautions to discourage parents from seeing their relationship with the school as a purely financial arrangement whereby they purchase a service for their child. It must resist the "prep school syndrome" arising out of parents who are looking for prestigious educational careers for their children.

The integration of specialties for the upper elementary child needs to be explored for a variety of solutions. It is, of course, important to impart some inspiration for artistic expression. One solution is the presentation of an upper elementary play, which combines music, art, and elocution. Or incidental art and music can be programmed one afternoon a week or one day after school, preserving the daytime for open, independent work.

Team teaching is also a temptation for the upper elementary in order to divide and conquer subject matter. Especially in new upper elementary classes, team teaching becomes a shortcut in getting materials researched and prepared. But subject departmentalization specializes teachers, eliminates the overview of each child, and models to the child that it is better to specialize than to experience a wide range of subject matter in the interdisciplinary Montessori tradition. After all, Montessori suggests that the teacher sow as many seeds as possible. The teacher needs to know all subjects in order to inspire the same in children.

Integrating Special Needs

Experienced Montessorians are also looking to take on children with special needs; evolving schools can challenge their senior staff with inclusion. Moreover, Montessori schools can combat elitism through including children with various physical, sensory, or developmental difficulties, thus deepening appreciation of diversity among the Montessori community at large.

Integrating All-Day Montessori

The evolving school frequently works on refinements of after-school programs and all-day support for working families. Once based on the three-hour preschool classroom, Montessori now finds itself in a pervasive culture of working parents. This means that creative solutions to all-day Montessori need to be designed so that children can find consistent, supportive, integrated experiences throughout the day. Especially for children under six, the day should be structured differently for those who stay ten hours than for those who attend for half a day. The after-school multi-purpose room where children of all ages are thrown into a play space may be a short-term solution, but Montessori schools have a great deal to consider about all-day designs that build a more natural pace and lifelike relationships between the children and the adults. Often schools consider a more homey design with natural environments, creating the aura of living in a "house for children." In addition to the use of Montessori materials, these prepared environments provide opportunities for preparing meals, sleeping, working outdoors, going for walks, and other daily living activities.

Building Plans: Integrating Space

Often at this stage of maturity, when programs diversify and the elementary program extends through grade six, building plans are initiated to insure that the full program is adequately housed in facilities aligned with the unique features of Montessori. Today there are enough such buildings to begin to collect building designs and synthesize new concepts that embody the developmental continuum by integrating the architecture of the building.

Because buildings need to be financed, five-year plans emerge to predict precisely the breadth of operations and set specific fundraising goals to offset debt service, which might over-encumber the school. These kinds of financial documents are now used more and more as an integral part of bookkeeping.

Integrating Funds Development: Long-Range Plan and Endowment

The long-range plan takes financial projections one step further. Looking at the unique evolutionary pattern of the school to date, the board, head of school, parents, benefactors, past board members, and faculty collaborate on a large document that integrates all levels of education, parent involvement, administration, financials, building, teacher development, and parent education for a five-year projection or more. Once a long-range plan is developed, an endowment fund will find its purpose.

Stage Four: Integrating the Program through the Adolescent Identity

Part of the maturation process for some Montessori schools is the adolescent's synthesis of both the preschool and elementary preparation. As adolescents emerge into the third plane of development, they reveal the underpinnings of their education–a need to pursue their individual interests, independent learning, practical life integrated with cultural learning, confident self-expression, socialization, a sense of community and belonging, etc. Put in a nutshell, the concrete learning of the preschool and the abstraction of the elementary converge on the adolescent community, which unifies both hand and head with an element of heart–bondedness. No matter how extensive the interface between preschool and elementary prior to the founding of an adolescent program, the real coming together of the first and second planes is found in the formative work of the young adolescent. From a developmental point of view, it is a second chance for significant self-construc-

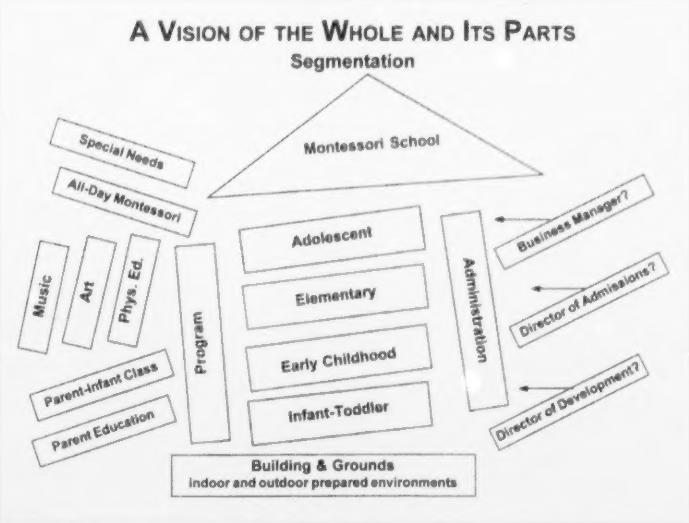
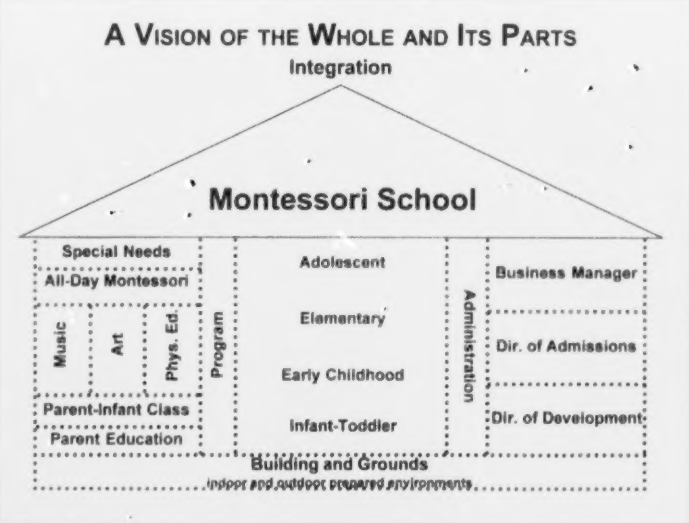

A Vision of the Whole and Its Parts
Segmentation
Montessori School
Special Needs
All-Day Montessori
Music
Art
Phys. Ed.
Program
Adolescent
Elementary
Early Childhood
Infant-Toddler
Administration
Business Manager?
Director of Admissions?
Director of Development?
Parent-Infant Class
Parent Education
Building & Grounds
Indoor and outdoor prepared environments

Figure 2.


A Vision of the Whole and Its Parts
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Early Childhood
Infant-Toddler
Administration
Business Manager
Dir. of Admissions
Dir. of Development
Building and Grounds
indoor and outdoor prepared environments

Figure 3.

tion—some say a last chance. The work with the adolescent adds a complexity to the school simply because it is a new stage of development that requires integration of diverse program elements and environments for learning.

Montessori Evolution: From Segmentation to Integration

As we enter the third millennium, the segmented, step-by-step evolution of the Montessori school may evolve into a well-integrated continuum. The Montessori school is experiencing its full potential for the first time as it looks at all of its parts and puts together the big picture of its interdependent nature (see Figures 2 and 3). The seamless Montessori continuum has yet to be achieved. But the framework is there as schools face their increasing complexity and understand what it means to connect from within and to connect to the outside world. To connect from within is to know the implications of the Montessori design, the link between one educational level and the next as it unfolds in the child's personality. To connect to the outside is to be able to bring the conscious Montessori educational model to eventual interaction with the educational establishment as a whole.

The "new child" needs a new school that materializes developmental stages and is assessed for developmental outcomes. Dr. Montessori's comprehensive theory and practice, envisioned as four planes of education, has taken a century to implement. Now, the puzzle pieces need to be put in place to reveal a picture of human patterns for development, critical to healing of the human condition and necessary to the completion of a great, unfinished body of work.

It is only by refocusing as a whole school—by living together as one organism—that a school community becomes tuned to its inner directives. Only when all the parts coalesce around a common vision can the various voices and diverse talents connect to create the school's own design. Change in one aspect of the school can have myriad and far-reaching effects in other areas; seeming conflict among elements can be prelude to new possibilities. But the complexity of interrelationships must be respected and supported in order for the rich potential of our schools to be revealed.

This entire handbook reflects this principle of integration. Although divided into sections for easy reference, all parts are interconnected. Finances cannot be divorced from program development or staff relations or any of the other elements of the school. Admissions procedures are interrelated with parent involvement, financial health, and program evaluation. Program expansion, capital campaigns, and long-range planning present schools with opportunities to develop greater cohesion. Decisions about resources reflect priorities. Without integration of all parts of the school in the decision-making process, factions and feuds can erupt or the focus can shift to a more narrowed agenda. Yet at these times, the need to re-examine mission can lead to a shared sense of expanded potential.

Shaping leadership in light of this principle of integration is perhaps the most difficult aspect of administration. It is so easy for administrators to assert their own agenda, to determine the priorities, to push for the quick solution to problems. It sometimes seems easier to work with separate factions–it is tempting to divide and conquer. It is very difficult not to over-direct by organizing and managing according to a prepared plan.

Wholeness in our schools is seen and felt in greater motivation, initiative, and sustained work. Wholeness is manifested in both a greater sense of stability and a heightened spirit of creativity. This sense of inner direction permeates all aspects of the school–classroom dynamics, parent relations, fundraising efforts, board deliberations–when we allow for and work toward integration.

Conclusion

This brings us full circle to the importance of vision and purpose. The whole individual develops through purposeful activity–through a concentrated and directed focus, not scattered or dispersed. So, too, a whole school develops its full potential through concentration of energy directed by a shared vision. It is shared vision–this focus on the release of human potential–that shapes a philosophy and frames a clear purpose in Montessori schools. That purpose, then, concentrates our will and directs our practice.

This approach asks the head of school, parent, teacher, and child to be part of a living, evolving "organism" and to lead primarily through service. Montessori has given us the essential principles–the questions to ask in any given situation: How can I serve the development of human potential? How can I respect and aid the life of this school?

Maria Montessori had a profound reverence and respect for the way in which each child manifests a distinct personality. She recognized that, although humans share common tendencies and progress through the same stages of development, no two evolve in exactly the same manner. Though there are reliable universal patterns that guide development, each individual creates his or her unique design within those larger patterns.

So it is with schools. There are some common stages and transitions in the general pattern of growth and development among Montessori schools. However, there is no master blueprint–no one mold or formula. Rather, each school creates a variation on the pattern and evolves a distinct personality. Therefore, although we can develop guidelines for starting or expanding Montessori schools, we cannot completely predict, nor prescribe, the way in which any individual school will manifest itself.

This handbook is a guide for shaping the Montessori school's unique administrative practice. As they look at their own practices, schools that are evolving their operations ask many of the same questions: How should a Montessori school begin and grow? How should a school prioritize what will be realized in its Montessori principles? How does one motivate a board and faculty towards the essence of Montessori? The art of school management is organic and cooperative; the educator collaborates with a growing organism, never dictating or coercing.

As Montessori schools develop the full continuum of education from birth onward, they are part of a larger evolutionary process. Montessorians see the future in the present–and believe that the way in which the school "lives" and grows will shape not only the development of those within our own communities but also the development of human society.

Further Reading from NAMTA

The following articles and documents are available as photocopies from NAMTA. See Appendix 4 for ordering information.

Dubble, Sharon L. "Evolving through Transitions: Mitigating Anxieties." *The NAMTA Journal* 21.2 (1996, Spring): 179-187. 5 total pages.

Dubble, Sharon. "Growing Schools for Human Growth." *The NAMTA Journal* 22.1 (1997, Winter): 159-174. 9 total pages.

Kahn, David. "The Montessori Learning Community: Evolving Schools, Evolving Adults, Evolving Children." *The NAMTA Journal* 20.2 (1995, Spring): 1-17. 9 total pages.

Kendall, Sharon. "Educational Administration and the Montessori Model: A Comprehensive, Independent Approach." *The NAMTA Journal* 17.1 (1991-92, Fall-Winter): 173-193. 11 total pages.

Zeman, Mary. "The Normalized School: Montessori as a Way of Life." *The NAMTA Journal* 21.2 (1996, Spring): 165-176. 7 total pages.

* * *

Organizational and Financial Foundations

The long-term future of a school is shaped by organizational, program, and financial decisions that are made at the very beginning. These decisions are not separate; they are working parts of the whole, forming a blueprint for the future. The school's mission statement provides the basis of program design and vision. The bylaws reflect the mission statement insofar as they dictate the terms of governance and financial accountability. The program emerges in embryonic form as the board hires its first Montessori-trained staff, thereby delegating academic responsibilities to a professional.

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Brief: Starting a New Montessori School

Introduction

This chapter is intended as a briefing for those starting a school. Cross-references refer the reader to more extended discussions in other chapters. Readers who are starting a new school should read this entire book, recognizing that this chapter represents a kind of checklist of what to take into consideration when first opening a new school.

Montessori schools are usually founded by parents who are looking for a sensitive but secure initial educational experience for their children. These parents intuit the helping role of the adult, realizing that learning must come from within the child, not by external force, and that the child's development is active from birth. Montessori philosophy is a child-rearing approach whereby the adult nurtures the unfolding development of the growing child, which is at once physical, intellectual, emotional, and spiritual.

First Steps

For more information on the Montessori developmental continuum, see Chapter 4.

In the beginning, the paramount objective is to envision what the school is to become in the context of the entire Montessori developmental continuum. A book discussion led by a Montessori professional is the first way for founders to envision the school's future. Paula Polk Lillard's book *Montessori Today* gives a good overview of Montessori education from birth to adulthood. It is also good to read at least one Montessori primary source (see the book list on the next page). Many Montessori programs see, at their inception, the value of encompassing all stages of children's growth in a fully vested alternative education plan; even those schools that stay with only the preschool level (ages 3-6) embrace a philosophical orientation to the child's whole development.

Montessori Today, by Paula Polk Lillard (1996, Random House), is available from NAMTA. See the NAMTA catalog or Web site <www.montessori-namta.org> for current price and shipping information.

INTRODUCTORY BOOK LIST

The earliest English edition is listed for each title. These books can be borrowed from your local library or purchased from NAMTA. See the NAMTA catalog or Web site <www.montessori-namta.org> for current price and shipping information.

Montessori, Maria. *The Absorbent Mind.* Madras, India: Theosophical Publishing House, 1949.

Discusses the development of infants and young children from birth to three years. Gives a clear explanation of the basis of Montessori theory and method.

Montessori, Maria. *The Child in the Family.* Chicago: Henry Regnery, 1956.

A series of short essays about the child, the family, and the school, with a philosophical emphasis.

Montessori, Maria. *From Childhood to Adolescence.* New York: Schocken, 1973.

Discusses the development and education of the child from age seven through adolescence. Includes Dr. Montessori's thoughts on university education.

Montessori, Maria. *To Educate the Human Potential.* Madras, India: Kalakshetra Publications, 1948.

Describes the needs of the elementary-aged child in the process of acquiring culture.

Montessori, Maria. *The Secret of Childhood.* New York: Frederick A. Stokes and Co., 1936. (Not available directly from NAMTA. Order through your local bookstore or online at www.montessori-namta.org.)

An introduction, both practical and theoretical, including observations and insights into the nature of young children.

Standing, E. M. *Maria Montessori: Her Life and Work.* London: Hollis and Carter, 1957. (Not available directly from NAMTA. Order through your local bookstore or online at www.montessori-namta.org.)

Covers Maria Montessori's life, how she developed Montessori education, its theoretical basis, and the worldwide growth of the Montessori movement.

Task Force

For more information on the board of trustees, see Chapter 2

Prior to the founding of the school, a task force or steering committee made up of members of diverse backgrounds–financial, legal, real estate, management, and Montessori, to name a few–provides initial direction to the project. If at all possible, at least one trained Montessorian should be on the task force. A task force will often evolve into a board of trustees after it makes decisions concerning incorporation, meeting local governmental requirements, and site selection.

Incorporation

See Chapter 2, Organizational Structure, for a full discussion of the pros and cons of incorporation as well as the options to incorporate as for-profit or nonprofit.

State and Local Regulations

Check with state and local agencies for their requirements concerning health record-keeping, class size, food service, teacher-student ratios, teacher credentials, etc. Montessori schools usually have to deal with at least two governing bodies: (1) the state department of education or state superintendent of public instruction, and (2) child care licensing by a social or health services agency. In addition, keep in mind zoning and building codes for the site selection phase.

Affiliation

Montessori associations offer affiliations in order to provide outside consultation and professional development while upholding the highest standards for Montessori practice. Schools in the United States can become recognized, affiliated, or associated with the Association Montessori

Internationale (Amsterdam, Netherlands) through its branch office, AMI/USA, 410 Alexander St., Rochester, NY 14607; (716) 461-5920; fax (716) 461-0075; usaami3@aol.com. The American Montessori Society offers six levels of school membership: accredited school, full affiliate, auxiliary affiliate, corresponding school, subscriber school, and associate school. Contact AMS at 281 Park Avenue South, 6th Floor, New York, NY 10010; (212) 358-1250; fax (212) 358-1256.

Site Selection

See Chapter 5, The Architectural Expression of the Developmental Continuum, for guidelines on selecting a school site. Before finalizing classroom design, review the site for compliance with zoning, fire and building codes, and health regulations. Panic bars, exit lights, fire alarm pull stations, fire exits, boiler inspections, and safety plugs are details which may be overlooked and then cause cost and inconvenience later.

Insurance

Board members, teachers, and staff should be insured against any unforeseen legal liability or action. A school insurance policy package should include liability, property, and boiler insurance. Schools with 100 to 300 students generally have up to five million dollars in liability insurance. This figure can vary with the size of the school and regional norms. Whatever the case, do not open without coverage. Property insurance should include coverage for building replacement cost as well as contents for all risks. Business interruption insurance is usually a good investment. It covers losses caused by the termination of business due to fire or other insured perils. Some schools either provide or require parents to carry accident insurance for their children. When purchasing insurance for the school, it is wise to select a quality broker or knowledgeable board member to evaluate the school's needs and design its particular policy.

A Trained Montessori Teacher

Montessori-trained teachers are a necessary component of a Montessori school. They have full working knowledge of the materials, whose refinements and sequences are essential to the fullest implementation of Montessori education. Montessori teachers have deep respect for the child's emerging personality; they observe more than other teachers because they are intensely trained to observe. They have a firm grounding in Montessori child development theory, allowing them to see what sensitivities are operating in the child and how the child engages with particular exercises. Montessori teachers are trained to follow the child and to limit direct instruction. Without these approaches to learning, a school cannot truly be a Montessori school.

The Classroom

The information presented here is intended as a start-up checklist. See Chapters 4-5 and Appendices 1-3 for a complete discussion of the prepared environment and the Montessori program.

An ideal Montessori classroom is sunny and airy but draft-free, with low windows and a tile or wood floor. Ideally, restrooms are located just off the classroom with child-sized toilets and low sinks. Classrooms are often finished with acoustical ceiling tile and curtains in cool pastels. Child-height water sources and drinking fountains are nice features, along with low light switches. A separate entrance with a cloakroom, plus an adjacent teacher office and storage space, are characteristic of classrooms built for Montessori. Even in large schools, modular classrooms open up to individual outdoor spaces, with interior alcoves and discrete spaces that help create a "house for children" atmosphere.

See Chapter 4 for more information about all-day Montessori

If there is to be an all-day Montessori program (a day-care program integrated with the Montessori day) for ages three to six, each preschool classroom should ideally have an adjacent nap and play space.

Square Footage

Classrooms generally consist of approximately forty square feet per child, including both carpeted and wet space, with sinks in the room. Wet space is usually about four hundred square feet in order to accommodate lunch.

Furniture

See Chapter 5 for more detailed information on furnishings and shelving.

Furniture styles are varied in design. Tables can have different shapes, including rectangles, squares, ovals, trapezoids. Chairs should be matched to table height, which varies according to the age level of the class. Shelving, whether painted or natural wood, should be light in color, child-sized, and 8" to 12" wide for easy access. New schools often begin with simple and inexpensive board-and-brick shelving.

Outdoors (Playgrounds)

Enriched outdoor environments include a natural habitat and adjacent gardening and activity space for each classroom. Pickup and drop-off traffic access, benches for waiting children, child-sized picnic tables, and safe playgrounds are other aspects to consider.

Rental Space

See Chapter 5 for specific advice on obtaining rental space

Rental space for the classroom is frequently obtained from schools, churches, park buildings, community centers, apartment complexes, other private schools, nursery schools, and estate mansions.

Start-Up Capital and Budgeting

In an unincorporated school or an incorporated for-profit school (see Chapter 2 for definitions), the founder or founders provide the funds necessary to start the school. This start-up capital comes either from the founder's personal funds or from a loan. In an incorporated nonprofit school, startup capital usually comes from a combination of philanthropic gifts and long-term loans.

The articles by Roger Hart, Bill Lucas, and Robin Moore listed under Further Reading from NAMTA in Chapter 5 provide excellent ideas for outdoor spaces that promote the whole child's development.

The following are capital budget items–those expenses that deal with furniture, fixtures, and non-consumable Montessori hardware. The costs listed are estimates established in 1999.

- **Montessori Apparatus:** $20,000-$25,000 per classroom, preschool or elementary level.
- **Practical Life:** $800-$1,000 per classroom, preschool level only. Includes equipment for washing, pouring, polishing, food preparation, eating, etc.
- **Furniture:** $4,000-$5,000 per classroom, preschool or elementary level. Includes chairs, tables, and bricks and boards to build shelving.
- **Office Furniture and Equipment:** $2,000-$5,000. Much equipment is available used, but options such as a computer or laminator can be very expensive.
- **Books:** $3,000 per classroom. There is nothing like beautiful books, although used books are sometimes better than new.
- **Licenses and Occupancy Fees:** $500-$1,000 per classroom.
- **Building Repair:** Refurbishing a classroom depends strictly on the condition of the site and the standards of the school. It always represents some expense.

For more information on capital versus operating budgets, consult Chapter 3

Starting Montessori Classes

A New Preschool (Three to Six) Class

The new preschool class accepts $2\frac{1}{2}$- to $3\frac{1}{2}$-year-olds, with a suggested starting peer group of about 8 to 15 children, reaching 25 to 35 children per classroom in the third year.

See Chapter 4 for a detailed discussion of programs by age level

Four-Year-Olds: Admission of four-year-olds is discretionary and may be necessary, but should be carefully considered as the older children constitute the leaders of the class.

Orientation: Shorter periods of orientation (less than three hours) should be established for the first two weeks for groups of four or five children each. The full operating class comes into formation with full morning sessions once the children feel safe and confident enough to function independently. A parent orientation provides the essential communication for this period. Home visits by the teacher after the orientation make this period more personal.

See Chapter 7 for more information on child and parent orientation

Dividing the Day: A school day is usually three hours per morning five days a week, with an additional two to three hours in the afternoon for third-year children who are five and over (the "extended day"–not to be confused with "all-day Montessori"). It is not advisable to have two

See Chapter 4 for more information on all-day and extended day programming options

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groups of children use the same classroom morning and afternoon respectively. Besides making the "extended day" impossible, this use of space gives a feeling of crowding. Limiting classroom use to one group of children allows for more creative use of the environment, more personal bonding with the class, and better-quality Montessori.

A New Elementary Class

Generally it takes three preschool classes to feed one starting elementary class, assuming a beginning retention rate of about one-third of those graduating from the preschool. After some years, the retention rate may increase to as high as 80%, and this growth will need to be accommodated. Children without Montessori background can be admitted but should have good skills and good behavior. It can also be effective, if necessary, to bring back older graduates who have been out of Montessori for a year and want to return. Minimum skills to look for are phonetic reading, numeral recognition to 1,000, and letter formation in process. Good independent choice-making and work habits are some desirable non-academic qualities.

Class Size: Although somewhat subjective, a minimum group of children the same age should be about six with optimal results occurring with eight or more. A frequently used start-up ratio is 15 six-year-olds and 10 seven-year-olds. Strive for as many children with Montessori background as possible.

Feeder Schools: "Feeder schools" for an elementary program are nearby Montessori preschools that do not have elementary programs of their own. Elementary enrollment of children from feeder schools can be encouraged through visiting lectures and promotional flyers. Reassure feeder schools with a promise to recruit their families only for your elementary program, not for your preschool program.

School Year: At the elementary level, a school year is usually approximately 180 days with 6 to 6½ hours of school per day. Schools should check with their state board of education to make sure they are meeting state requirements.

New Infant and Toddler Communities

See Chapter 4 for a full description of program options for under-threes.

Schools are seeing a dramatic increase in interest in infant- and toddler-level programs. This interest is partially due to parents' increased awareness of the importance of the first three years of life. On a purely practical level, however, much of the interest stems from the current growth of two-income homes and single-parent families, leading to a need for quality all-day programs for younger children. When considering starting an infant-toddler program, therefore, a school needs to assess the needs of its community, its mission, and its own financial position in order to determine what format the program should take: a school-year-format, parent-infant class; a half-day infant community; or a year-round, all-day program.

All-day programs for children under three may not be profit generators due to the high adult-to-child ratio, but they do build a base for the school's programs for older children, as well as parental understanding of Montessori approaches. When an all-day program is offered at this age, demand for such a format for older children will follow. Most schools are already attempting to come to terms with such demands at all age levels. Traditional school-year-format, parent-infant classes and half-day infant communities might serve the local population without putting as much strain on school finances. Furniture alone for one infant community environment costs approximately $7,500, not including sleeping mats.

Another difficult issue is finding qualified infant-level Montessori professionals. Many schools are sponsoring their own staff through the zero-to-three ("Assistants to Infancy") training since the pool of trained personnel for this age group is so small and the demand so large.

Prepare for the opening of an infant program by offering specific parent education sessions. A prenatal parent education series can attract new families for a parent-infant class or *Nido*. A series of presentations on the development of movement, language, and independence, with an emphasis on how the Montessori infant community provides opportunities to master developmental milestones, would inform an existing school population about possibilities for their younger children. Though serving the needs of the children is still our major task, it becomes very obvious at this age level that assisting the parents in their complicated modern parental role is a crucial service that Montessori education is uniquely qualified to offer.

School Law: A Checklist for Beginners

This information is provided with the understanding that NAMTA is not engaged in rendering legal, accounting, or other professional service. If legal advice or other expert assistance is required, the services of a specialized professional should be sought. This is not a comprehensive discussion of school law but rather a summary of common legal situations a school may need to anticipate. Whenever in doubt regarding legal problems within a school community, it is important to contact an attorney who specializes in school law.

Personnel

- Especially for nonprofit organizations, it is important to establish, document, and follow clear nondiscriminatory policies in the hiring process.
- An employment contract and written job description should be drawn up for each employee.
- The availability and presentation of benefits to staff are governed by ERISA, the Employee Retirement Income Security Act, which requires, among other things, promulgation of all benefits in writing and equal benefits for equal staff. Consult an attorney when setting up benefit packages of any kind to ensure compliance with the ERISA law.
- Termination of contracted employees requires a very specific sequence of events. Prepare ahead of time by establishing and documenting these procedures as well as a grievance procedure.

See Chapters 9 and 10 for detailed guidelines on hiring, contracts, benefits, termination, personnel records, payroll, unemployment, and nondiscrimination.

- Confidentiality of personnel files is the responsibility of the head of school.

- Specific procedures must be followed to ensure accuracy in personnel records, especially with respect to personnel evaluations.

- When a payroll is first set up, it should be reviewed by a CPA for compliance with all federal, state, and municipal laws regarding the management of personnel wages.

- Schools may elect to reimburse unemployment, thereby exempting themselves from unemployment tax, which can save funds in many states. This practice is subject to a specific set of procedures.

Students and Parents

- The teacher and/or school can be held liable for injuries to students under a variety of circumstances. Familiarize all faculty and staff with precautions to take in order to minimize both the risk of injury and the perception of negligence. See Chapter 10 for a full discussion of liability issues.

- Fair representation of school activities in the school brochure is considered part of the contractual relationship between the institution and the persons who rely on those representations.

- Most states have laws requiring the reporting of suspected child abuse. Schools should familiarize themselves with laws and procedures specific to their area. See Chapter 10 for more details.

- Medical authorization for emergency treatment of the child by a specific doctor at a specific facility should be given by parents as part of the admissions process. See Chapters 7 and 10.

- Students can be expelled or suspended only with the protection of a published procedure which includes an appeal process. Expulsion requires cause, notice, and a review process. See Chapters 7 and 10.

- Parents have a legal right to see any information that is forwarded to other schools unless they have waived their access to such materials. See Chapter 7.

- A policy of racial nondiscrimination in admissions is essential. See Chapter 2 for a comprehensive discussion of Internal Revenue Service regulations regarding nondiscriminatory procedures.

- Tuition collection and refund policies should be published in the parent handbook, brochure, or catalog. A tuition contract is recommended. See Chapters 3 and 7.

Organizational Structure

Introduction

The basic organizational structure of a school is more than functionary. Creating a strong mission statement, well defined bylaws, and a diverse board of trustees creates an organic base from which to grow a school.

The Mission Statement: Encapsulating the School's Organizational Purpose

Mission statements are a consensus tool that can be formulated and re-formulated at every stage of a school's development. They are particularly useful at start-up, when the school's scope and purpose need to be defined and the school community needs to be oriented to a common set of expectations.

Brevity is the soul of a mission statement; it needs to reflect the purpose and spirit of an institution at a glance since it may appear in brochures, proposals, planning and legal documents, etc. The mission statements in this chapter's Sample Documents include references to the age group(s) the school intends to serve; the needs of the child; a prepared environment according to Montessori principles; parent involvement; development of the whole child (including self-esteem, love of learning, cooperation, etc.); school philosophy; and economic, racial, and cultural diversity.

Although the process of formulating a mission statement varies from school to school, the rule of thumb is that it needs to involve, in some way, parents, board members, faculty, administration–the whole school community. Yet when a large community tries to formulate a mission statement, the process can become time-consuming and counter-productive. One way to avoid these pitfalls is to start with an open school community brainstorming session facilitated by a professional writer (perhaps a parent) for ideas on what the mission statement should include. Then, to avoid large-scale debate over style, vocabulary, length, and complexity, the ideas can be refined by a small committee, still working with the help of the professional writer. Finally, when the proposed mission statement has been drafted, it is circulated to the whole school community for review and ratification.

See Chapter 6 for more information on school brochures and promotional materials.

Since mission statements are often pragmatic and to the point, they can seem devoid of inspiration. This can be remedied in brochures and other materials by printing the mission statement in conjunction with a few well-chosen Montessori quotes and a good summary of the school's Montessori philosophy.

Mission statements aren't "cast in stone." At key steps in a school's expansion, a re-visitation and clarification of mission helps to focus the direction of the school community.

Incorporation

A private school can operate as a sole proprietorship (an unincorporated entity with one owner), a partnership (an unincorporated entity with multiple owners), or a corporation (either for-profit or nonprofit). Establishment of an unincorporated entity may seem attractive due to its ease: No legal paperwork is usually required unless the business operates under a name other than that of its owner. However, it is usually advisable that schools incorporate in order to:

- limit liability in the case of lawsuits;
- present a stable image to the community;
- provide a legal entity for financial operations and insurance;
- provide a framework for continuity and change;
- provide an organizational vehicle for fundraising, acquiring property, and obtaining a state charter; and
- extend the life of the school beyond the founder.

Generally speaking, incorporation is necessary for serious and consistent community engagement. Unincorporated programs could depend on a church or community center for organizational structure, but because they are not autonomous organizational entities with their own defined Montessori purposes, unincorporated schools tend toward philosophical flux and low assets, which are not conditions conducive to stable Montessori education.

The cable television network Court TV provides a helpful "Legal Survival Guide" on the World Wide Web. A concise comparison of various for-profit organizational options is at www.courttv.com/legalhelp/business/organization/compare.html.

A school can choose to incorporate as either a for-profit or a nonprofit corporation. **For-profit status** allows for specific ownership of the resources, profit making, and profit sharing.

It also allows a profit to be made on any school resources (property, materials, office equipment, etc.) that are liquidated. The owner or partnership has complete control of the operations and the parents take on the role of consumers. The owner or owners provide the investment for startup of the school. Therefore, for-profit schools tend to be small, one- or two-classroom schools.

State laws and the Internal Revenue Service govern the founding of a for-profit corporation. There are three types of for-profit corporations: "C" corporations, "S" corporations, and limited-liability corporations, each with its own organizational and tax rules. Although for-profit private schools traditionally choose to incorporate as "S" corporations, schools should consult an attorney familiar with the law in their region to help them decide which type is best for their situation.

A nonprofit foundation may be established by a for-profit school under strict legal supervision. The nonprofit foundation can receive gifts on behalf of the for-profit within tight governing strictures, which should be looked at by an attorney who specializes in nonprofit legal issues.

A nonprofit corporation (also known as not-for-profit or 501(c)(3), after the Internal Revenue Service regulation that governs their tax-exempt status) enjoys exemption from federal and often state taxes: sales tax, property tax, income tax, etc. However, its employees must still pay income tax on their earnings, and it must pay the employer's share of payroll taxes. It can solicit and receive individual gifts or foundation grants, which are in turn tax-deductible for the donor. Usually a combination of philanthropic gifts and long-term loans provides start-up funds and ongoing capitalization.

See Chapter 3 for more information on start-up funding

Nonprofits must liquidate their assets to another nonprofit when they terminate operations. In most nonprofit schools, parents of enrolled students make up the majority of the board, maximizing volunteerism. Some, however, have boards appointed by the founding head of school, apart from the parent community (see The Board of Trustees, below).

This publication will largely be written with the nonprofit perspective in mind.

The Evergreen State Society, Seattle, WA, sponsors "The Internet Nonprofit Center," a helpful Web site with basic nonprofit information, at www.nonprofits.org.

Articles of Incorporation and Bylaws

The school's articles of incorporation are filed with the state. In some states, this document is called a charter. It establishes the school as a corporation, ascribes its general purpose, and makes the board of trustees accountable for carrying out this purpose. The bylaws implement the articles of incorporation by defining the duties and procedures of the board of trustees. The articles of incorporation can be changed only by state action; the bylaws are revised at any time necessary, reflecting the evolving needs of the school. Together, the articles of incorporation and the bylaws define the governance of the school.

NONDISCRIMINATORY POLICIES FOR NONPROFIT SCHOOLS

by Walter & Haverfield, P.L.L.
Cleveland, OH
Reviewed and amended November, 1998

Memorandum

I. Scope

This memorandum is intended to discuss the necessary procedures to be followed by any 501(c)(3) organization in order to satisfy the Internal Revenue Service (IRS) requirements regarding non-discriminatory policies.

II. Law

Since racial discrimination is contrary to well-established federal public policy, a school not having a nondiscriminatory policy is not "charitable" and will not qualify as tax-exempt. *Bob Jones University v. U. S.*, 468 F. Supp. 890 (D.C.S.C. 1978), *rev'd & rem'd* 639 F. 2d 147 (4th Cir. 1980), *aff'd* 461 U. S. 574 (1983).

The IRS has announced guidelines and record-keeping requirements for determining whether a private school has a racially nondiscriminatory policy as to its students. Rev. Proc. 75-50, 1975-2 C.B. 587. The school must show affirmatively that: (1) it has adopted a racially nondiscriminatory policy as to students which is made known to the general public; and (2) since the adoption of the policy, it has operated in a bona fide manner in accordance therewith. A summary of the guidelines is highlighted below.

A. Organizational Requirements

A school must include a statement in its charter, bylaws or other governing instrument, or in a resolution of its governing body, that it has a racially nondiscriminatory policy as to students, and therefore, does not discriminate against applicants and students on the basis of race, color, and national or ethnic origin.

B. Statement of Policy

Every school must include a statement of its racially nondiscriminatory policy as to students in all of its brochures and catalogs dealing with student admissions, programs, and scholarships. The IRS will recognize the following statement as acceptable:

> Notice of Nondiscriminatory Policy as to Students
>
> The ________ school admits students of any race, color, national and ethnic origin to all the rights, privileges, programs and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, national and ethnic origin in administration of its educational policies, admissions policies, scholarship and loan programs, and athletic and other school-administered programs.

Further, every school must include a reference to its racially nondiscriminatory policy in any other written advertising material that it uses as a means of informing prospective students of its programs. The IRS will recognize the following statement as acceptable:

> The ________ school admits students of any race, color, and national or ethnic origin.

C. Publicity

Each school seeking exemption must make its racially nondiscriminatory policy known to all racial segments of the general community served by the school. A school is advised to use one of two methods to accomplish this goal.

First, the school may publish a notice of its racially nondiscriminatory policy in a newspaper of general circulation that serves all racial segments of the community. This publication must be repeated at least once annually during the period of the school's registration period. The notice must appear in a section of the newspaper likely to be read by prospective students and their families and it must: (1) occupy at least three (3) column inches; (2) be captioned in at least twelve (12) point bold-face type as a notice of nondiscriminatory policy as to students; and (3) be printed in at least eight (8) point type.

Second, the school may use the broadcast media to publicize its policy if this use makes such policy known to all racial segments of the general community that it serves. Announcements must be made during the period of the school's solicitation for students or, in the absence of a solicitation program, during the school's registration period. If this method is elected, the school must provide documentation that the means by which the policy was communicated to all racial segments of the general community was reasonably expected to be effective. Appropriate documentation would include:

1. Copies of the tapes or scripts used; and
2. Records showing:
   a. Adequate number of announcements;
   b. The announcements were made during hours when the policy was likely to be communicated to all racial segments of the general community;
   c. They were of sufficient duration to convey the message clearly; and

d. They were broadcast on a radio or television station likely to be listened to by substantial numbers of members of all racial segments of the general community.

The procedures described in the two above-described methods need not be complied with if the school can meet one of three exceptions.

First, if for the preceding three years the enrollment of a parochial or other church-related school consists of students at least 75% of whom are members of the sponsoring religious denomination or unit, the school may make known its racially nondiscriminatory policy in whatever newspapers or circulars the religious denomination or unit utilizes in the communities from which its students are drawn.

Second, if a school customarily draws a substantial percentage of its students nationwide, worldwide, or from a large geographic section of the United States and follows a racially nondiscriminatory policy as to students, the publicity requirement may be satisfied by following the procedures hereinbefore set forth in Part B.

Third, if a school customarily draws its students from local communities and follows a racially nondiscriminatory policy as to students, the publicity requirement may be satisfied by following the procedures hereinbefore set forth in Part B.

The IRS encourages schools to comply with one of the two methods in the revenue procedure regardless of whether they qualify under one of the above-described exceptions. On audit, a school would be required to show that it was justified in publicizing its policy under any of the three exceptions.

Failure to comply with the guidelines will ordinarily result in the proposed revocation of the exempt status of the school in accordance with the procedures set forth in Rev. Proc. 72-4, 1972-1 C.B. 706.

D. Applications for Tax-Exempt Status

All schools filing an application for exemption must supply the IRS with the following information:

1. Racial composition, as of the current academic year and projected as far as may be feasible for the subsequent academic year, of the
   - a) student body,
   - b) faculty, and
   - c) administrative staff;
2. Amount of scholarship and loan funds, if any, awarded to students enrolled and the racial composition of the students who have received such awards;
3. A list of incorporators, founders, board members, and donors of land or buildings, whether they be an individual or an organization; and
4. Statement whether any organization immediately hereinbefore set forth has, at the time the application is filed, an objective of maintaining segregated public or private school education and, if so, a statement whether any individual immediately hereinbefore set forth is an officer or active member of such organization at the time the application is filed.

For purposes of determining racial composition, the estimate may be based on the best information readily available to the school, without requiring student applicants, students, faculty, or administrative staff to submit information to the school that it otherwise does not require.

As mentioned at the beginning of this memorandum, there are also record-keeping requirements set forth in Rev. Proc. 75-50. Each exempt private school must maintain, for at least a period of three (3) years beginning with the year after the year of compilation or acquisition, the following information:

1. Records indicating the racial composition of the student body, faculty, and administrative staff for each academic year;
2. Records sufficient to document that scholarship and other financial assistance is awarded on a racially nondiscriminatory basis;
3. Copies of all brochures, catalogs, and advertising dealing with student admissions, programs, and scholarships; and
4. Copies of all materials used by or on behalf of the school to solicit contributions.

Failure to maintain, or to produce upon the proper request, the required records and information will create a presumption that the organization has failed to comply with this revenue procedure.

III. Conclusion

In summary, Rev. Proc. 75-50 requires that a tax-exempt private school: (1) include in its literature a racial nondiscrimination policy; (2) publicize said policy through a proper medium; and (3) keep certain records for a period of three (3) years.

Insurance

When forming a school organization (whether incorporated or not), it is important to consider possible exposure to unforeseen legal liability or action. Fortunately, as soon as a school organization is formed, it is an insurable entity. A school insurance policy package, including liability, property, and boiler insurance, should be obtained as early as possible.

The Board of Trustees

The board of trustees (sometimes known as the board of directors) is the governing body of an incorporated school and endeavors to protect and develop the school community. Its primary concerns are the financial and program functions of the school, for which it defines a program mission and operating policies. Over time, as the program develops, its operations may be delegated to a head of school and administrative staff. In the early stages of the school, the board may handle bookkeeping, purchasing, care of building and grounds, etc., in lieu of an administrative staff in order to save money.

Two excellent sources for board operating guidelines are the *NAIS Trustee Handbook* available from the National Association of Independent Schools, 1620 L Street NW, Washington, DC, 20036; and *How to Put Your Board Together in Ways That Make Sense: The ISM Trustee Guidebook*, available from ISM Management Resource Services, 1316 N. Union St., Wilmington, DE 19806-2594.

The board of trustees at an established school is usually responsible for decisions related to finances, which include setting the budget, tuition, and salaries, as well as supplementing school operations through fundraising. Building and grounds acquisition and long-term maintenance is another prominent board function. Board involvement with personnel includes the hiring and evaluation of the head of school, grievances that go beyond the head of school, and allocating funds for professional development.

The board is entrusted with the development of the school according to its founding purpose and assumes ultimate responsibility for its operations:

- The board ensures adherence to the school's mission in its programs and policies.
- The board is the governing body of the school and legally accountable for all operations.
- The board provides for future development of the school through planning and resource development.

In carrying out this charge, the responsibilities of trustees fall into three general categories:

- programs
- finances
- evaluation

The specific responsibilities within these areas are discussed below, in the section on Board Responsibilities.

Board Composition

A board of trustees is usually composed of 7 to 13 members plus the head of school, who serves as a non-voting *ex officio* member. Whether appointed or elected, board members are selected for their commitment to the mission of the school and for their ability to contribute particular expertise or experience.

The composition of the board should be representative of the school's constituents (children, parents, staff, community). This does not imply that each group should have a representative on the board. Rather, the board's composition includes members who have both input from and influence with each major constituent group. Faculty, staff, and students usually do not serve as board members; the head of school represents their interests on the board. If the head is not Montessori trained, it is advisable to seek a board member from the community who has Montessori training.

Characteristics of a Board Member

- Has convictions about the mission of the school and is committed to contribute to its success.
- Is willing to become more knowledgeable about Montessori education and to be a spokesperson for the school in the community.
- Has specific experience or expertise in at least one relevant area: Montessori education, finance, construction, public relations, fundraising, law, volunteer organization, etc.
- Devotes time to preparation, planning, and meetings.
- Demonstrates commitment through financial donations to the school.
- Focuses on the long-range implications of decisions.

Responsibilities of the Board

Board responsibilities are divided among three major areas: program, finances, and evaluation.

Program

- Set and oversee general operational policies.
- Select and hire the head of school. The board delegates to the head full responsibility for administrative functions and refrains from interference in program operations.
- Approve long-range plans and set annual strategic goals.
- Maintain visibility in the school. Board members should occasionally observe in the classrooms and frequently participate in school functions.
- Refer to the head of school requests for specific program review or new program development.
- Provide advice, at the request of the head, regarding sensitive administrative matters.

- Establish clear communication channels and a grievance process. Serve as source of final appeal only when a decision cannot be resolved through administrative channels. (This rarely occurs in a well-functioning school.)

Finances

The board's financial responsibilities can be grouped in three categories:

1. Asset Management

- Determine policies for use of resources.
- Set investment policy and monitor investment performance.
- Maintain stewardship of buildings and grounds (construction, renovation, and maintenance). Ensure that the physical property adequately supports programs.

2. Budget

- Approve an annual budget.
- Determine tuition policies, including payment schedules, penalties, refund policy, and financial aid.
- Approve benefit policies, staff size, and total compensation for staff.
- Periodically review budget, monitoring cash flow and ensuring adequate funding for programs.

3. Fundraising

- Oversee funds development and set goals for major fundraising endeavors.
- In consultation with head of school, determine priorities for use of all funds raised, in line with the annual strategic goals.
- Set an example by making individual donations to the school.
- Actively solicit donors in all major fund drives.

Evaluation

- Conduct an annual evaluation of the head of school, using specific standards and goals mutually developed by the board and the head.
- Evaluate the overall program of the school in light of annual strategic goals.
- Conduct an annual self-evaluation, examining the organization and functioning of the board of trustees. Review bylaws and amend as necessary for effective operation.
- Participate in an annual board retreat to reflect upon the school's mission, review evaluations, and develop a new set of strategic goals. This important activity combines program and evaluation responsibilities.

Board Organization and Functioning

Officers

A board of trustees is self-managing and organizes itself to effectively fulfill its responsibilities. Leadership is a key element in the board's organization. The school's bylaws specify the duties of board officers and how they are chosen. Officers are usually elected annually by the board, although it is advisable to seek officers who can commit to serve a minimum of three consecutive terms. This provides important continuity of leadership for both the board and the head of school. The responsibilities of the three major officers are outlined here.

President

The president is both the administrative leader of the board and a partner/consultant with the head of school. This role requires a major commitment of time, strong communication skills, discernment, and the ability to maintain confidentiality.

- The president and the head of school are the lead spokespersons for the school.
- The president and head meet regularly to discuss the needs and operations of the school. The president serves as a sounding board for the head. Their relationship involves mutual counsel and critique.
- The president chairs all board meetings. Together with the head of school (or with the executive committee), the president prepares the agenda for each board meeting.
- The president chairs the executive committee.
- The president (often with the executive committee) conducts an annual evaluation with the head of school and provides a summary report to the full board.
- The president monitors the work of all committees and ensures that the board effectively carries out its responsibilities.
- The president, with the executive committee, conducts an annual evaluation of the board's performance and organizes the annual board retreat.

Treasurer

The treasurer provides information and leadership to assist the board in its responsibility for the financial health of the school.

- The treasurer chairs the finance committee.
- The treasurer provides consultation for the head of school in drafting a recommended annual budget.
- The treasurer meets monthly with the head of school and/or business manager to review financial activity and prepares a year-to-date financial report each month.
- The treasurer prepares a brief summary report of school finances for each board meeting.

- The treasurer arranges for an annual independent financial audit.

Secretary

The secretary facilitates preparation for board meetings and documents the work of the board.

- The secretary takes minutes at each board meeting. Written copies of minutes are distributed to each board member within one week following the meeting.
- The secretary distributes reports, agendas, and other materials prior to the board meeting to allow members adequate preparation time.
- The secretary maintains the official record of all board minutes. Annually, the secretary compiles a summary of all board decisions during the year. Summaries are distributed to all board members and included in the official record.
- The secretary keeps the institution's seal, used for legal documents.

Meetings

Several factors are essential for effective board meetings:

- advance preparation by all members
- clear procedures
- facilitation

The full board should meet monthly according to an annual calendar. The president may call interim meetings, if necessary, as long as a quorum is present. The president chairs the meetings, organizing the procedures according to the agenda and facilitating discussion. Regular meetings should be scheduled for a maximum of two hours.

The major focus of the board is the mission of the school and its future development. The primary purpose of monthly board meetings is to make decisions regarding recommendations from the head of school or committees (see section below on committees). Several guidelines help members to work together effectively in board meetings:

- Insist that recommendations come to the board ready for review, discussion, and decision. Written recommendations should be provided to members in advance of the meeting.
- Avoid doing or redoing committee work. If necessary, return reports to the committee for further work, giving specific instructions.
- Keep discussion focused on a particular topic and summarize key points before moving to another topic.
- Be familiar with the fundamentals of parliamentary procedure and allow the president to guide deliberations accordingly.

Committees

Much of the work of the board is done through committees. Committees are charged by the board with specific responsibilities. Generally, a committee focuses on a particular aspect of the school's development and formulates recommendations for the board. Although a committee may be given authority to implement certain decisions, only the full board has the power to make major decisions and to formulate policy.

Committees serve four important functions:

- They divide the work of the board and permit careful study of specialized areas.
- They expedite board meetings by removing routine tasks from monthly consideration.
- They identify and utilize the specific abilities and knowledge of board members.
- They permit broader participation by members of the school community.

There are two types of committees: standing committees and *ad hoc* committees. The bylaws specify the standing committees, which are established as permanent committees. The board itself may organize *ad hoc* committees for specific purposes. These committees are generally organized for a limited duration; once the specific task is completed, the committee disbands.

Each board member is appointed annually to one or more standing committees. Additional members from the school community are appointed to committees based on their specific expertise or experience. The head of school and board president are *ex officio* members of every committee, although they rarely attend all meetings.

Generally, a board member is named chair of each committee and is responsible for reporting from the committee to the full board. This is essential for all standing committees. In *ad hoc* committees where the chair is not a board member, one of the board members is appointed to serve as liaison between that committee chair and the board.

A clear charge or commission from the board is essential to the functioning of committees. The board specifies the committee's responsibilities and the limits of its authority. The commissions for standing committees are often included in the bylaws. Charges to all committees should be in writing and should frame the responsibilities within the mission of the school.

The number and type of standing committees will vary among schools. Listed below are the most common standing committees and a brief description of their responsibilities.

Executive Committee

The executive committee is composed of the officers of the board and the head of school. (In large boards, other trustee committee chairs may also be appointed to this committee.) The president chairs the committee.

The chief function of this committee is to plan for the work of the board by developing agendas and other guidelines for board actions. The executive committee may refer specific questions to

2. Organizational Structure

another committee for study and recommendation to the board. The executive committee plans for the orientation of new board members, the annual board retreat, and the annual board evaluation. Frequently, the president involves the executive committee in the annual evaluation of the head of school.

The executive committee has authority to make decisions in emergency situations when there is inadequate time to call a full board meeting. Limitations to decision-making power by the executive committee are clearly outlined in the bylaws.

Finance Committee

The treasurer chairs the finance committee. In addition to members with financial experience and expertise, the committee should include one member other than the head of school who has strong understanding of Montessori education and the school's mission. This ensures that financial decisions revolve around program needs.

The finance committee reviews and recommends financial policies and procedures. This committee oversees the development of the annual budget in close collaboration with the head of school and presents the budget to the board for approval. The finance committee oversees financial operations and provides the board with periodic reports and an annual audit. It also oversees the school's investments and recommends specific investment strategies to the board.

Building and Grounds Committee

The building and grounds committee oversees the other important category of the school's assets: property, buildings, and major equipment. The committee ensures that property is maintained and renovated to meet program needs. Members monitor the safety of the school's physical environment, as well as conformity to other regulatory requirements (e.g. fire and building codes).

The building and grounds committee makes recommendations for capital improvements. It reviews and oversees construction plans and works closely with both the finance committee and the funds development committee to plan for capital expenditures.

Funds Development Committee

The funds development committee oversees all fundraising efforts for the school. The committee sets policies for receiving gifts and conducting fundraising. In consultation with the head of school, it recommends to the board annual priorities for use of funds according to the school's strategic plan.

The funds development committee approves all fundraising events and may appoint *ad hoc* committees to implement specific events. The committee itself plans the annual fund drives and all capital campaigns. Committee members take an active role in cultivating and soliciting major donors and train the board members in the art of donor solicitation.

Public/Parent Relations Committee

The public/parent relations committee works to broaden the community's involvement with the school. The primary job of this committee is to coordinate volunteer efforts in support of the school's program. The committee also reviews major publications to ensure that they are consistent with the mission and image of the school. This committee occasionally recommends communication or marketing approaches to disseminate information about the school and its program and to further develop public/parent relations.

Board Member Code of Conduct

Board members model the respect and mutual support that is central to the philosophy of the Montessori school. As a group, they agree to abide by basic conduct guidelines:

- Attend all board meetings unless there is a valid reason for absence. Read reports, recommendations, and other materials to prepare in advance of meetings.
- Maintain confidentiality. Do not discuss board or committee deliberations outside the meetings. Communication of board decisions is through a common channel, not through individual members.
- All board members support the decisions of the board. Dissent is expressed in writing in the minutes or by letter to the board.
- Avoid professional conflict of interest or any semblance of self-enrichment as a result of position on the board.
- Avoid personal conflict of interest. If the board member has children in the school, he or she keeps the needs of his or her own child in perspective and focuses on the long-term needs of the school.
- Deliberate as a whole board. Factions within the board develop when individual board members report to each other or discuss board business outside of meetings.
- Support the integrity of the administration by referring questions and concerns from parents or staff to the head of school.

The willingness of the board member to accept the responsibilities of this important role is a great gift to the school. Through the board member's work and conduct, he or she preserves and enhances the mission of the school and contributes not only to its current health but also to its future evolution.

Board Handbook

A handbook for the board can be an aid in the orientation of new board members as well as providing a common framework for the board's work. It can also serve as a reference for policies and procedures.

The handbook should include the school's articles of incorporation, bylaws, and mission and philosophy statements; an organizational chart for the board and school; and a list of all board members and committee members with pertinent information (address, phone, fax, e-mail). It should also include the following sections:

- Board composition (number, method of appointment, terms, etc.)
- Board responsibilities
- Head of school responsibilities
- Responsibilities of all officers (president, treasurer, secretary, etc.)
- Schedule of meetings
- List of committees and responsibilities

Board members should also receive copies of all policy manuals, relevant legal and insurance documents, full minutes from the preceding year, and all annual summaries of board decisions.

Responsibilities of the Head of School

The board delegates to the head of school the responsibility for managing all operations of the school. The integrity of administration is maintained through clear delineation of the respective roles of board and head and good communication between the head and the board. The head's responsibilities are in three major areas:

See Chapter 9 for a full head of school job description as well as information on hiring a head of school.

Provide Professional Leadership for the School

- Articulate the school's mission for all constituents (students, families, staff, community).
- Be visible and accessible to members of the school community.
- Attend all board meetings and board retreats. Prepare regular reports to the board on school operations and program development.
- Guide the board in developing long-range and strategic plans. Provide for the board members' ongoing education about Montessori.
- Work with the staff to develop programs in accordance with the mission of the school.
- Play an active role in soliciting donations in all major fund drives.

Manage All School Operations in Accordance with Policies Set by the Board

- Assume responsibility for hiring, supervision, and dismissal of all staff. Provide an ongoing program for professional development.

- Administer the operating budget and be accountable to the board for effective business management.
- Develop specific operational goals and objectives to implement the strategic goals that have been mutually established with the board.
- Prepare annual budget recommendations, including recommendations for additions or changes in personnel, facilities, and programs.
- Oversee admission of students and, in consultation with faculty, make final decisions regarding disciplinary action or dismissal.

Evaluate the Operations of the School

- Conduct annual evaluations of all staff.
- Oversee student evaluation and assessment.
- Review operations to ensure compliance with requirements of all regulatory and accrediting bodies. Schedule outside consultation as needed.
- Provide leadership for ongoing program evaluation, including curriculum standards and curriculum development.

Board-Head Relations

One of the most frequent trouble areas for boards crops up in their relationship to the head of school and faculty. Here is a familiar list of board-staff relations gone wrong.

Faculty Communications Bypass the Head of School: Any time faculty members communicate with the board regarding the school's program, the head of school should be present. Otherwise the head is at risk of faculty circumvention or board preemption of the head's authority. In most cases, it is best for the head to represent the faculty in dealings with the board. In more democratic institutions, the faculty have their own representatives at board meetings, but such a position can compromise the head's ability to provide vision for the board. **Remedy:** Board chair stresses board-head confidentiality; any board member approached by a faculty member redirects the faculty member to the head of school.

Board Micromanages School Operations: Through committees or as individuals, boards may begin to dictate procedures for office management, staff hiring, faculty relations, program details, building and grounds maintenance, etc. In extreme cases, a board member may appear on the school campus and start giving directives to faculty or office staff. (This is to be distinguished, of course, from volunteer board members who are on campus to carry out tasks appointed by the board, such as sending out a fundraising letter. To avoid confusion, if board members need to involve the office staff in these tasks, they should first consult with the head.) **Remedy:** Board chair pulls back all board members and allows the head to do the job, or if that is not happening, then board evaluates the head. Clear bylaws can also offset this problem: The board chair can re-direct board members by referring them to the bylaws.

Board Dictates Program to Head: Montessori schools have program balance that Montessorians understand best. Boards may place undue emphasis on art, music, gym, foreign language, field trips, etc. Sometimes board members insist that a particular teacher's weakness in a subject area warrants whole-school curriculum reform. The authority of the program is eroded by too many cooks. **Remedy:** The board should leave program evaluation to the head, always protecting the autonomy of the program and the privacy of the teachers.

Parent Grievances Circumvent Head: Board members sometimes forget that they are not supposed to handle parent grievances before they are handled by the head. Sometimes a rumor can make a problem seem more urgent and the board becomes besieged by parent complaints. **Remedy:** Board members should refer all complaints to the head of school first, and if a complaint is not resolved, follow established grievance procedure.

See Chapter 8 for parent conflict resolution procedures.

Frequently Asked Questions

Should my school incorporate as for-profit or nonprofit?

A for-profit organization is for those who wish to run their school as a business without the complications of community intervention. Generally speaking, a preschool with one to three classrooms can operate well as a for-profit, showing sensitivity to families while still maintaining an entrepreneurial organizational structure.

It is usually when schools expand to elementary and middle school levels that the required resources and parent commitment are not obtainable in a for-profit environment, mostly because expanding schools need extensive gifts and connections, which can only come through a nonprofit organization. Furthermore, community-operated nonprofit schools tend to fit the current government guidelines for independent charter schools or for the use of tuition vouchers. Parents and philanthropists generally trust nonprofits, since their board structures are open to both parent and community review, which allows for stewardship of the school's assets and a life beyond the founder of the school.

If a school starts as a for-profit, it can later become a nonprofit, although the process is complicated enough to warrant avoiding it by starting out as a nonprofit.

In certain situations, a hybrid organizational structure can provide balance between the pros and cons of for-profit and nonprofit. For example, if a the founder of a nonprofit school wishes to build personal equity while still allowing the school to have all the advantages of a nonprofit, he or she could personally own property and lease it to the school. If the founder of a nonprofit school wishes to avoid parent interference in the Montessori program, then the founder can appoint the board of trustees from outside the parent community, choosing a trusted few loyal persons (keeping in mind, however, that this strategy might result in less volunteer giving on the part of parents). On the other hand, if a for-profit wishes for the advantages of a nonprofit, then, as mentioned already, a nonprofit foundation may be set up to provide a conduit for charitable gifts.

Generally speaking, if a founding board or person wishes to build a fully developed Montessori school from infancy through adolescence, then serious consideration should be given to nonprofit status, which has the possibility of setting down deep roots in the community and garnering the greatest resources.

How many members should be on the board?

For starting schools, smaller boards (usually seven or nine members) are sufficient to provide necessary coverage. As schools mature, they often increase the size of the board to allow for greater committee supervision or to expand fundraising capacity. Effective use of committee structure is another way to address the needs of an expanding school without increasing the number of board members. An odd number of trustees is recommended to avoid tie votes.

Although some schools have boards with up to 21 trustees, large boards (say, any more than 13 members) can have great difficulty with decision-making processes. To alleviate this problem, some schools appoint an executive committee, made up of officers as well as experienced board members, which meets apart from the whole-board meetings to prepare information and context for decision-making, coming to the board at large with well-formulated presentations. When this strategy is used, however, it is paramount that the executive committee only present information, leaving the actual decision making to the board at large so as not to demoralize board members who are outside the "inner circle."

Heads of school should always be included in board meetings. Usually the head of school is an *ex officio* member of the board and does not have a vote.

Should board members be elected?

Some school bylaws define each family at the school as a member of the corporation, giving each family one vote. Other schools require families to take a brief Montessori course of study before they become voting members. In other schools, the board appoints voting members from among the families at the school, usually those families with the most knowledge and experience of Montessori. In any of these cases, the membership elects the board, usually at an annual meeting.

The majority of schools, however, have "self-appointed" boards of trustees: The school founders appoint themselves and/or invite others to be board members, and each board appoints its successors. With a self-appointed board, there is no corporation membership. Instead, parents are part of a "parent association" that takes on projects defined by the trustees, usually small fundraisers. In this situation, it is important to have a written policy (either written into the bylaws or as an independent document) specifying that funds raised by the parent association revert to the school's general fund and that the board of trustees, not the parent association, determines how the funds are spent.

What should be the criteria for selection of board members?

Board members should be respected in the community, thoughtful, discreet, reliable, and steady in their working style. The greater the percentage of parents on the board of trustees, the more responsive the board will be to the school's needs. However, board members who are parents at the school must have the maturity to see the school as a whole and avoid judgements derived strictly from their own child's welfare. Montessori schools generally have a high proportion of parents on the board–usually about 90%-100%. On the other hand, having board members who are not parents provides some detachment in decision making as well as greater community outreach, resulting in a larger pool for admissions and a broader fundraising base.

A board functions best with a wide variety of backgrounds–law, administration, business, education, politics, real estate, community organizing, and communications for starters. Ethnic and gender balance reflecting the community composition is always good policy. Some board members are selected for their wisdom, others for longstanding familiarity with the school, others for their community connections. There should not, however, be too many board members who are chosen primarily for their connections with wealth or celebrity, since board members who are not parents can be prone to less involvement.

How long should a board member's term be and how many terms should each board member serve?

Board members' terms of office should be a minimum of two years; three years is a recommended maximum. Two-year terms may be more practical in that they allow selection of new members whose skills match particular projects, and they allow less active board members to step down in a more timely manner. However, three-year terms may contribute to greater continuity of governance.

Terms of office should be staggered: If terms are two years, approximately one half of the board members' terms should expire every year; if they are three years, approximately one third should expire every year.

Limiting the number of terms a trustee can serve limits the cumulative experience of the board and can diminish continuity. On the other hand, some schools prefer to write term limits into their bylaws to ensure a fresh perspective and a higher degree of parent participation on the board. When in doubt, it is probably better to err on the side of continuity so that a school can keep a good board member as long as possible. If the number of terms is limited, bear in mind the length of each term: shorter terms of office should mean that the allowed number of terms is greater.

What constitutes conflict of interest on the board?

Some times board members may be asked to do work for the school in various capacities (e.g. contracting, legal representation, etc.). This is not an incorrect procedure, but the following cautions are suggested:

1. The board member to be remunerated should disclose his or her interest in and personal gain from the decision.
2. The board member to be remunerated should be absent from the meeting in which the contract is discussed.
3. The board member should abstain from voting on the contract.
4. The minutes should record the above.

Do board members need any special training or orientation?

New board members should be offered a briefing or orientation about the school's history and trends, the expected role of the board, and a mini-course on the Montessori aspects of the school. A one-day retreat led by one or two experienced board members can give an excellent orientation. The head of school should be present at the board briefing or orientation, giving an occasion for the head to meet new board members.

It might be helpful to give new board members a copy of *The Whole-School Montessori Handbook*. Particularly helpful are the Introduction and Part I, which give an overall vision of Montessori school administration. As mentioned above, a board orientation manual or board handbook is also a helpful tool.

How does one keep a board functioning at the "macro" level?

Boards need to confine meetings to decision making around recommendations presented by the head of school or committees. Seldom should boards engage in detailed discussions that could be handled prior to the meeting by careful staff consideration or in committees. Recommendations should come to the board fully researched and ready for board review, discussion, motion, and resolution.

Further Reading from NAMTA

The following articles and documents are available as photocopies from NAMTA. See Appendix 4 for ordering information.

Brown, Rexford. "The Learning Organization: A Model for Educational Change." *The NAMTA Journal* 22.1 (1997, Winter): 191-203. 7 total pages.

Hutchins, Robert M. "The Administrator: Leader or Officeholder?" *The NAMTA Quarterly* 5.3 (1980, Spring): 21-30. 6 total pages.

Kahn, David. "Summary of Administrator's Survey." *The NAMTA Quarterly* 9.2 (1984, Summer): 32-48. 9 total pages.

Sample Documents

The following documents illustrate common practices in Montessori school operations. To view documents at full size, photocopy and enlarge.

Mission Statements

Aidan Montessori School, Washington, DC

The mission of Aidan Montessori School is to provide a Montessori experience for children aged 18 months through 12 years and respond to each child's individual strengths and needs.

This mission is accomplished by

- Adhering to Montessori theory and practice as defined by the Association Montessori Internationale (AMI).
- Encouraging cultural and ethnic diversity.
- Recognizing the value of a curriculum-based early childhood education.
- Fostering involvement of parents, teachers, students and the larger community.

Forest Bluff School, Lake Bluff, IL

School Mission:

To build a model Montessori School for children from birth to 15 years, stressing the spiritual development of children and their preparation for dealing with the variety of life's challenges at all ages.

To help parents to work toward the same goal at home with their children and to enable teachers and staff to remain focused on this goal and not be sidetracked by adult agendas. Children, and what is best for each individual child, comes first. Their spiritual welfare is the litmus test in every decision whether it involves curriculum, activities, programs, placement or evaluation.

Gladwyne Montessori School, Gladwyne, PA

The mission of the Gladwyne Montessori School is to provide quality education for children through 6th grade based on the values and principles of Maria Montessori.

Description: The Gladwyne Montessori School is a child-centered educational environment. Activities and curriculum are appropriate to the child's developmental stage. The integrated curriculum is guided by a highly-trained staff, which is aware of the needs of the individual child. The children are in mixed age three-year programs which allows for children to build long-term relationships with other children and their teachers within a caring community.

The child's experience is more fully integrated when parents and family become a part of the school community, an action which demonstrates the parents' commitment to learning and the desire to play an active part in their child's education. Parent educational materials and

Mission statements from Aidan Montessori School (Washington, DC), Forest Bluff School (Lake Bluff, IL), Gladwyne Montessori School (Gladwyne, PA), Lexington Montessori School (Lexington, MA), Metropolitan Montessori School (New York, NY), and Montessori School of Raleigh (Raleigh, NC) give an idea of the range of possibilities.

Mission Statements (continued)

programs encourage parents' participation in the education process at each stage of the child's development. As the school and home work together, the child ventures out into the world and becomes involved in projects which provide service to the community.

The education which the child receives is nurtured in a superior academic environment and takes place in a community which fosters self-esteem, independence, respect for fellow individuals, self-discipline, cooperation, and love of learning.

* * *

Lexington Montessori School, Lexington, MA

The Lexington Montessori School community works to create an environment that inspires children to develop inner discipline, self-assurance, and a love of learning. We respect the uniqueness of each student by helping each child to develop skills at periods of greatest readiness and sensitivity.

Our program provides a creative, adaptive environment that responds to the needs of the children. We seek to balance academic and social development to foster responsibility and cooperation within a supportive learning community.

Our students learn to view themselves as contributing members of a diverse global community. We respect and value differences, and look with an open mind at all members of the community, seeking to understand and value them for who they are. The staff, the parents and the children communicate clearly and openly and treat each other with honesty and mutual respect.

* * *

Metropolitan Montessori School, New York, NY

Metropolitan Montessori School is dedicated to providing an enriching and challenging educational environment where each child is encouraged to grow to his or her fullest potential academically, emotionally and socially. Through the dynamic partnership of child, parent and teacher, a consistent Montessori framework for learning is developed, offering an "education for life."

* * *

Montessori School of Raleigh, Raleigh, NC

The Montessori School of Raleigh, guided by the educational philosophy of Dr. Maria Montessori, inspires the development of individual children in a safe, supportive, culturally-diverse environment that gives them the freedom to explore, cooperate, create, and become. The School strives to be forward-looking, stable, and financially secure.

Commitment to Diversity, Lake Country School (Minneapolis, MN)

Mission Statement:

Lake Country School is an urban-based Montessori community whose purpose is to help children prepare themselves for life. We seek to mirror the rich diversity of our urban community. We foster independence, critical thinking, respect and responsibility to self, to others, and to the earth.

Excerpt from list of board committees:

Diversity and Gender Equity Committee

The Diversity and Gender Equity Committee is responsible for supporting and facilitating the achievement of the school's commitment to diversity. The committee works with staff, parents, and the Board to provide materials and guidance.

Excerpt from annual planning process:

We believe that the experience of diversity (diversity of race, gender, ethnic origin, economics, and opinion) is central to a rich contemporary learning environment as well as a necessary preparation for living in a diverse world with confidence and integrity. We are committed to:

- Actively supporting the work of the Diversity Committee of the Board, which assumes the development of a community rich in diversity and in the ability to interact in a non-gender-biased manner.
- Actively seeking diversity when sponsoring, recruiting, or hiring staff.
- Supporting the Montessori training of members of underrepresented groups.

Excerpt from long-range strategic plan:

Lake Country School is committed to achieving a community that is rich in the diversity of economic and social classes, racial and ethnic heritages, religious and spiritual beliefs, physical abilities, and family structures that are found in the larger society.

Enhancing the diversity of the school is an implied component in each of the recommendations.

A strong commitment to diversity is evident in the school's mission statement, committee structure, annual planning, and long-range plan.

A Tale of Two Mission Statements, Ruffing Montessori School East (Cleveland Heights, OH)

FOUNDING MISSION STATEMENT, 1960:

To produce within an atmosphere of true Christian humanism creative personalities, makers in art, in love, in home, in society, who will share in the work of recreating the world, turning their lives, their work, and their homes in the worship of God.

* * *

REVISED MISSION STATEMENT, 1998:

The mission of Ruffing Montessori School is to employ the philosophy and methods of Dr. Maria Montessori to educate young people to their fullest potential, instilling a deep sense of personal independence and social responsibility. With the knowledge that they are citizens of the world, they will contribute to that world by making decisions based on the highest order of ethics and conscience.

To achieve its mission, Ruffing:

Respects each child for who he/she is.

Encourages individual initiative and personal interests, fostering individual academic excellence.

Offers choices within the Montessori environment allowing children to help shape their own learning.

Promotes the development of independence, self-respect, and respect for each other.

Brings together children of diverse ages, religious, cultural and economic backgrounds to develop social skills and ethical standards.

Offers freedom within the classroom while encouraging and requiring the self-discipline students need to use that freedom well.

To achieve these goals, Ruffing:

Fosters experimentation, observation and discovery.

Presents cultural diversity in the meeting of universal human needs.

Emphasizes the harmony of the geological, biological and historical world.

Instills appreciation for historical achievements and a sense of responsibility for the future.

Develops knowledge of math through the manipulation of concrete materials.

Inspires expression through fine arts.

Develops speech and writing skills as well as a love of literature.

Education is a joyful, lifelong process based on a solid academic foundation. Employing the philosophy and materials of Maria Montessori, Ruffing provides a unique alternative to traditional schools, both public and private.

Compare Ruffing's founding mission statement, written in 1960, to the one written by the school's fourth generation of parents in the 1980s and revised in the 1990s. The contrast reveals the school's stages of development and renewal.

Articles of Incorporation, Montessori Center of Oak Ridge (Oak Ridge, TN)

CHARTER OF

MONTESSORI CENTER OF OAK RIDGE

The undersigned persons, having capacity to contract and acting as the incorporators of a corporation under the Tennessee General Corporation Act, adopt the following charter for such corporation:

1. The name of the corporation is Montessori Center of Oak Ridge.

2. The corporation is to have a perpetual duration.

3. The address of the principal office of the corporation in the State of Tennessee shall be Cumberland Presbyterian Church, Lafayette Drive, Oak Ridge, County of Anderson.

4. The corporation is not for profit.

5. The purposes of the corporation are to:
   a) Promote, establish, support, and maintain an educational facility to educate young children in accordance with the educational philosophy and methods of Dr. Maria Montessori.

   b) Exercise, in general, and subject to such limitations and conditions as are or may be prescribed by law, such other powers which are now or hereafter may be conferred by law upon a corporation organized for the purposes hereinabove set forth, or necessary to or incidental to the powers so conferred, or conducive to the attainment of the purposes of the corporation subject to the further limitation and condition that, notwithstanding any other provision of these articles, this corporation shall not carry on any activities not permitted to be carried on by a corporation exempt from Federal Income Tax under Section 501 (c) (3) of the Internal Revenue Code of 1954 as amended or the corresponding provision of any future United States Internal Revenue Law or by a corporation contributions to which are exempt under Section 170 (c) (2) of the Internal Revenue Code of 1954 as amended or any other corresponding provision of any future United States Internal Revenue Law.

6. The corporation will formulate and enforce a racially nondiscriminatory policy. Students and applicants will not be discriminated against on the basis of color, race, and national or ethnic origin.

7. Trustees, not less than three (3) nor more than (12), shall serve terms of two (2) years. Of the initial Trustees, appointed by the incorporator, one-half (1/2) or the closest possible fraction

These articles of incorporation are typical, short and to the point.

Articles of Incorporation, Montessori Center of Oak Ridge (continued)

greater than one-half shall serve a term of one (1) year and one-half (1/2) or the closest possible fraction less than one-half (1/2) shall serve a term of two (2) years if the number of Trustees is increased or decreased, the terms of the Trustees may be adjusted so that the terms of one-half (1/2) of the Trustees expire each year.

8. Trustees may be removed for cause by a majority of the members.

9. In the event of dissolution, the residual assets of the corporation shall be turned over to one or more organizations which themselves are exempt as organizations described in Sections 501 (c) (3) and 170 (c) (2) of the Internal Revenue Code ,or as it is amended, or to the Federal, State, or Local government for exclusive public purpose.

Dated this twentieth day of July, 1977.

Dena Jean Sklad
INCORPORATOR

Robert E. Schwall
INCORPORATOR

Linda R. Schwall
INCORPORATOR

INCORPORATOR

Rebecca L. Lew
INCORPORATOR

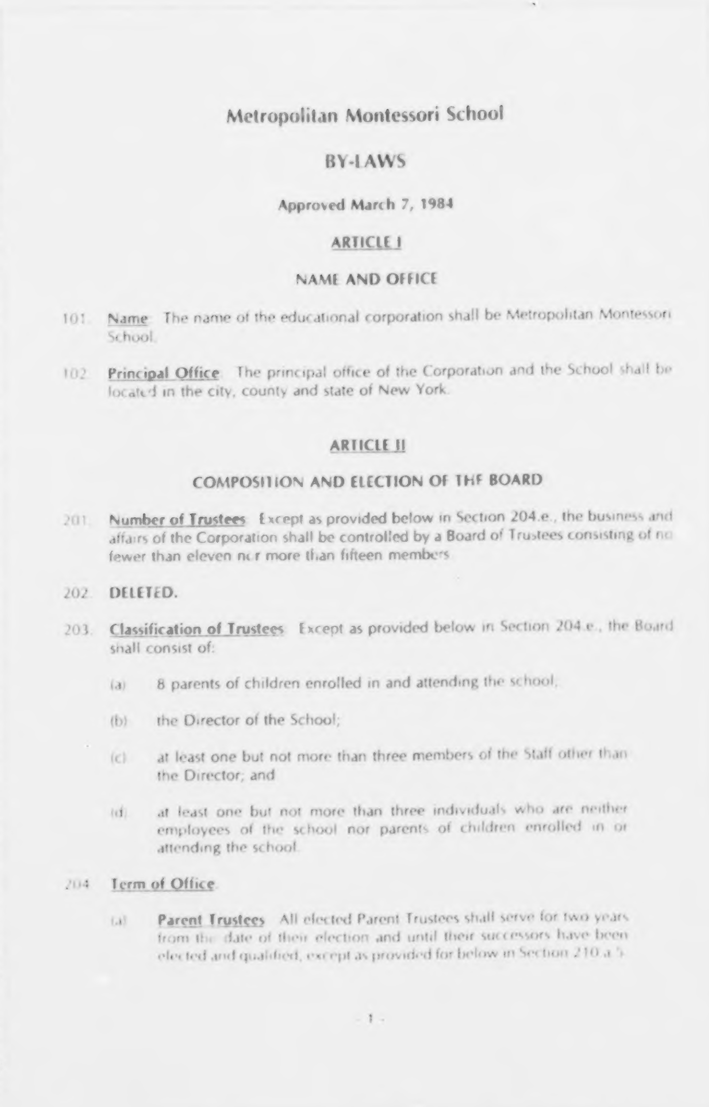
Kathleen A. Wells
INCORPORATOR

INCORPORATOR

Philip S. Sklad
INCORPORATOR

Bylaws, Metropolitan Montessori School (New York, NY)

An excellent example of a comprehensive bylaw document, including well defined board roles, meeting procedures, and parent association governance.



Metropolitan Montessori School

BY-LAWS

Approved March 7, 1984

ARTICLE I

NAME AND OFFICE

101. **Name** The name of the educational corporation shall be Metropolitan Montessori School.

102. **Principal Office** The principal office of the Corporation and the School shall be located in the city, county and state of New York.

ARTICLE II

COMPOSITION AND ELECTION OF THE BOARD

201. **Number of Trustees** Except as provided below in Section 204.e., the business and affairs of the Corporation shall be controlled by a Board of Trustees consisting of no fewer than eleven nor more than fifteen members.

202. DELETED.

203. **Classification of Trustees** Except as provided below in Section 204.e., the Board shall consist of:

(a) 8 parents of children enrolled in and attending the school;

(b) the Director of the School;

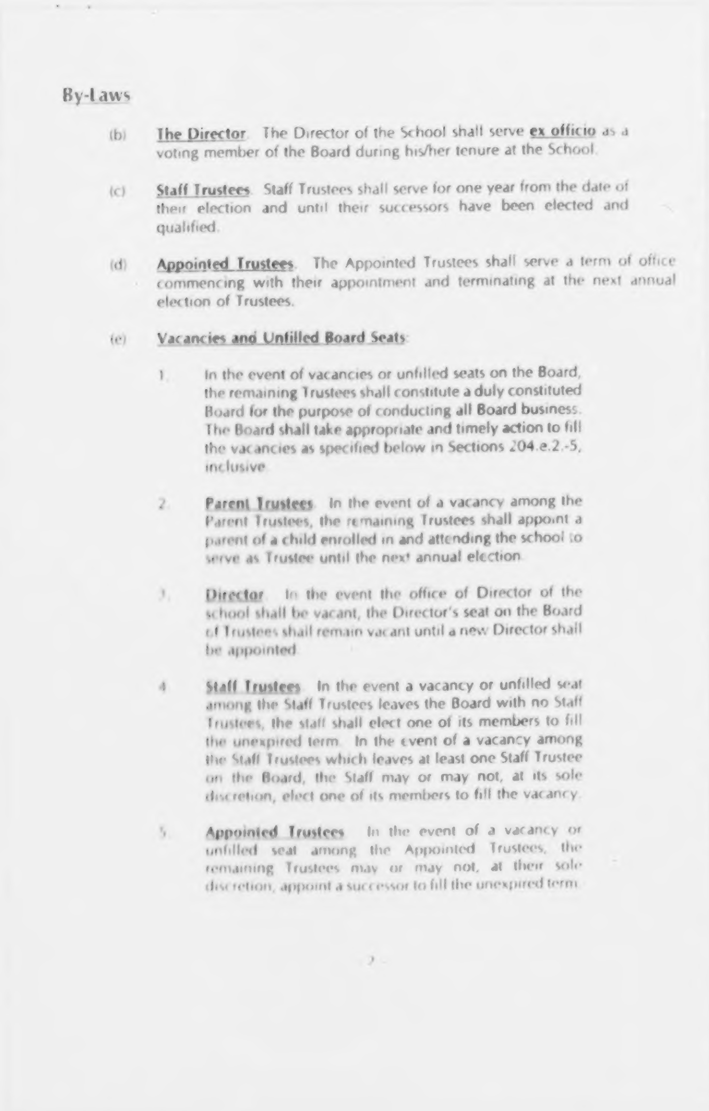
(c) at least one but not more than three members of the Staff other than the Director; and

(d) at least one but not more than three individuals who are neither employees of the school nor parents of children enrolled in or attending the school.

204. **Term of Office**.

(a) **Parent Trustees** All elected Parent Trustees shall serve for two years from the date of their election and until their successors have been elected and qualified, except as provided for below in Section 210.a.5.

- 1 -



By-Laws

(b) **The Director** The Director of the School shall serve ex officio as a voting member of the Board during his/her tenure at the School.

(c) **Staff Trustees** Staff Trustees shall serve for one year from the date of their election and until their successors have been elected and qualified.

(d) **Appointed Trustees** The Appointed Trustees shall serve a term of office commencing with their appointment and terminating at the next annual election of Trustees.

(e) **Vacancies and Unfilled Board Seats**:

1. In the event of vacancies or unfilled seats on the Board, the remaining Trustees shall constitute a duly constituted Board for the purpose of conducting all Board business. The Board shall take appropriate and timely action to fill the vacancies as specified below in Sections 204.e.2.-5, inclusive.

2. **Parent Trustees** In the event of a vacancy among the Parent Trustees, the remaining Trustees shall appoint a parent of a child enrolled in and attending the school to serve as Trustee until the next annual election.

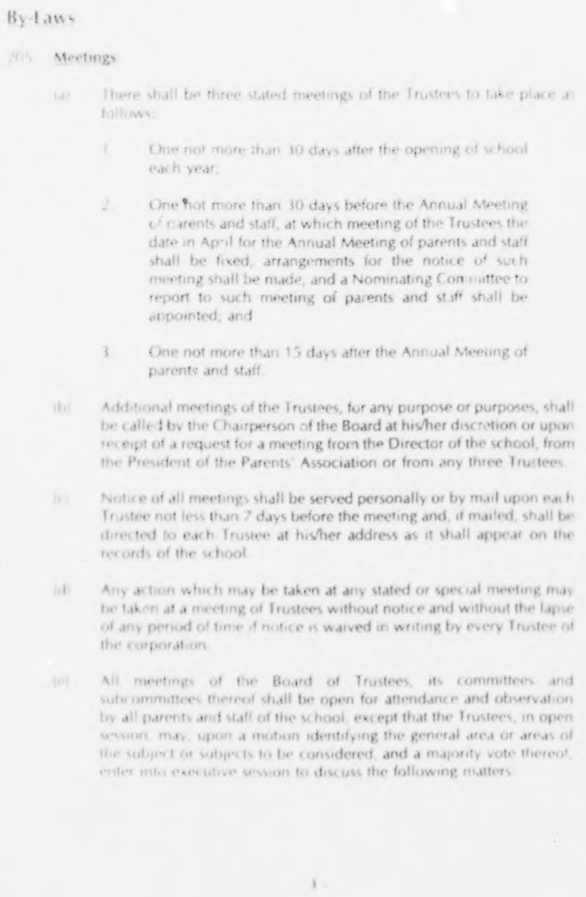
3. **Director** In the event the office of Director of the school shall be vacant, the Director's seat on the Board of Trustees shall remain vacant until a new Director shall be appointed.

4. **Staff Trustees** In the event a vacancy or unfilled seat among the Staff Trustees leaves the Board with no Staff Trustees, the staff shall elect one of its members to fill the unexpired term. In the event of a vacancy among the Staff Trustees which leaves at least one Staff Trustee on the Board, the Staff may or may not, at its sole discretion, elect one of its members to fill the vacancy.

5. **Appointed Trustees** In the event of a vacancy or unfilled seat among the Appointed Trustees, the remaining Trustees may or may not, at their sole discretion, appoint a successor to fill the unexpired term.

- 2 -

Bylaws, Metropolitan Montessori School (continued)



205. **Meetings**

(a) There shall be three stated meetings of the Trustees to take place as follows:

1. One not more than 30 days after the opening of school each year;

2. One not more than 30 days before the Annual Meeting of parents and staff, at which meeting of the Trustees the date in April for the Annual Meeting of parents and staff shall be fixed, arrangements for the notice of such meeting shall be made, and a Nominating Committee to report to such meeting of parents and staff shall be appointed; and

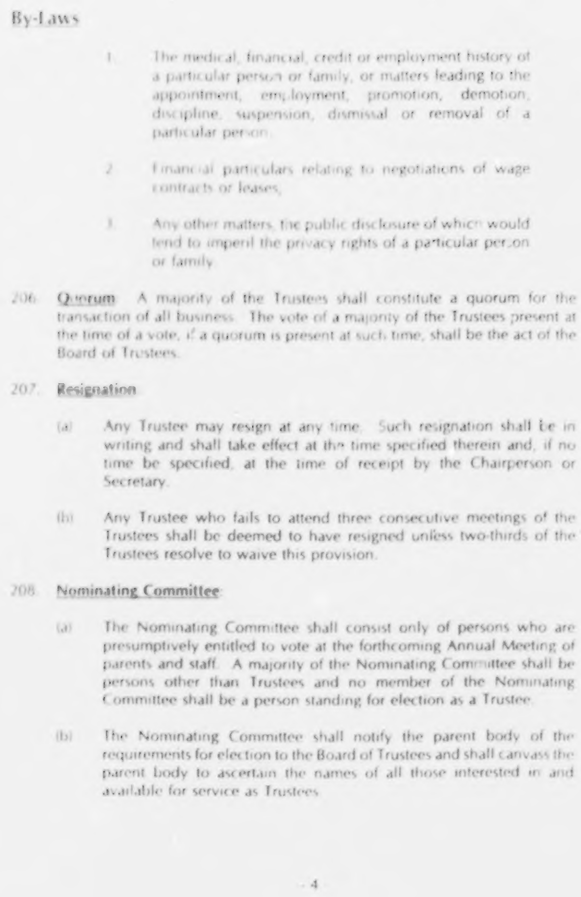
3. One not more than 15 days after the Annual Meeting of parents and staff.

(b) Additional meetings of the Trustees, for any purpose or purposes, shall be called by the Chairperson of the Board at his/her discretion or upon receipt of a request for a meeting from the Director of the school, from the President of the Parents' Association or from any three Trustees.

(c) Notice of all meetings shall be served personally or by mail upon each Trustee not less than 7 days before the meeting and, if mailed, shall be directed to each Trustee at his/her address as it shall appear on the records of the school.

(d) Any action which may be taken at any stated or special meeting may be taken at a meeting of Trustees without notice and without the lapse of any period of time if notice is waived in writing by every Trustee of the corporation.

(e) All meetings of the Board of Trustees, its committees and subcommittees thereof shall be open for attendance and observation by all parents and staff of the school, except that the Trustees, in open session, may, upon a motion identifying the general area or areas of the subject or subjects to be considered, and a majority vote thereof, enter into executive session to discuss the following matters:



1. The medical, financial, credit or employment history of a particular person or family, or matters leading to the appointment, employment, promotion, demotion, discipline, suspension, dismissal or removal of a particular person.

2. Financial particulars relating to negotiations of wage contracts or leases;

3. Any other matters, the public disclosure of which would tend to imperil the privacy rights of a particular person or family.

206. **Quorum**. A majority of the Trustees shall constitute a quorum for the transaction of all business. The vote of a majority of the Trustees present at the time of a vote, if a quorum is present at such time, shall be the act of the Board of Trustees.

207. **Resignation**.

(a) Any Trustee may resign at any time. Such resignation shall be in writing and shall take effect at the time specified therein and, if no time be specified, at the time of receipt by the Chairperson or Secretary.

(b) Any Trustee who fails to attend three consecutive meetings of the Trustees shall be deemed to have resigned unless two-thirds of the Trustees resolve to waive this provision.

208. **Nominating Committee**.

(a) The Nominating Committee shall consist only of persons who are presumptively entitled to vote at the forthcoming Annual Meeting of parents and staff. A majority of the Nominating Committee shall be persons other than Trustees and no member of the Nominating Committee shall be a person standing for election as a Trustee.

(b) The Nominating Committee shall notify the parent body of the requirements for election to the Board of Trustees and shall canvass the parent body to ascertain the names of all those interested in and available for service as Trustees.

Bylaws, Metropolitan Montessori School (continued)

(c) The Nominating Committee shall circulate to the entire parent body at least 10 days prior to the Annual Meeting of parents and staff a written report containing the names of all qualified persons who have indicated their availability and interest and who have agreed to stand for election, together with a ballot form containing said names and instructions for casting the ballot either by mail or by deposit at the school in the course of or prior to the Annual Meeting.

(d) The Nominating Committee shall place or cause to be placed at a convenient location in the school a ballot box for the receipt of ballots. Such ballot box is to be available to parents for the deposit of their ballots from the time of the circulation to the parent body of the ballots until the conclusion of the election at the Annual Meeting.

(e) The Nominating Committee shall be responsible for tallying ballots to ascertain the results of the election of Parent Trustees and announcing these results before the conclusion of the meeting.

209 Qualifications of Trustees

(a) Parent Trustees. A Parent Trustee must be a parent as defined below in Section 603.a. In the event that a Parent Trustee shall no longer have a child enrolled in the school, for whatever cause, said Parent Trustee shall cease to be a member of the Board and his seat declared vacant.

(b) Staff Trustees. A Staff Trustee may be any full-time teacher employed by the school or any other employee of the school in any capacity deemed eligible to serve as Trustees by majority vote of the full-time teachers. Such other capacities may include but are not limited to administrative staff, full- or part-time classroom assistants, full- or part-time specialty teachers.

(c) Appointed Trustees. Appointed Trustees may include any individuals other than parents and staff members the Board in its sole discretion deems appropriate for service on the Board. Qualifications for service in this capacity may include but are not limited to such attributes as comprehensive knowledge of the philosophy of Montessori education, knowledge of and familiarity with school administration, or personal ties to the school gained as a former student at the school or the parent of a former student.

210 Methods of Election and Appointment

(a) Parent Trustees

1. All parents of children enrolled in and attending the school are eligible to stand as candidates for election to the Board of Trustees.

2. The election of Parent Trustees shall take place by sealed ballot, delivered to the school either by mail or in person either in the course of or prior to the Annual Meeting of the parents and staff.

3. The number of candidates on the ballot shall be at least one more than the number of vacancies to be filled in the Board of Trustees. Each valid ballot shall be cast for any number of candidates up to and including the number of vacant seats to be filled. Election results shall be tabulated by counting the number of ballots marked for each candidate.

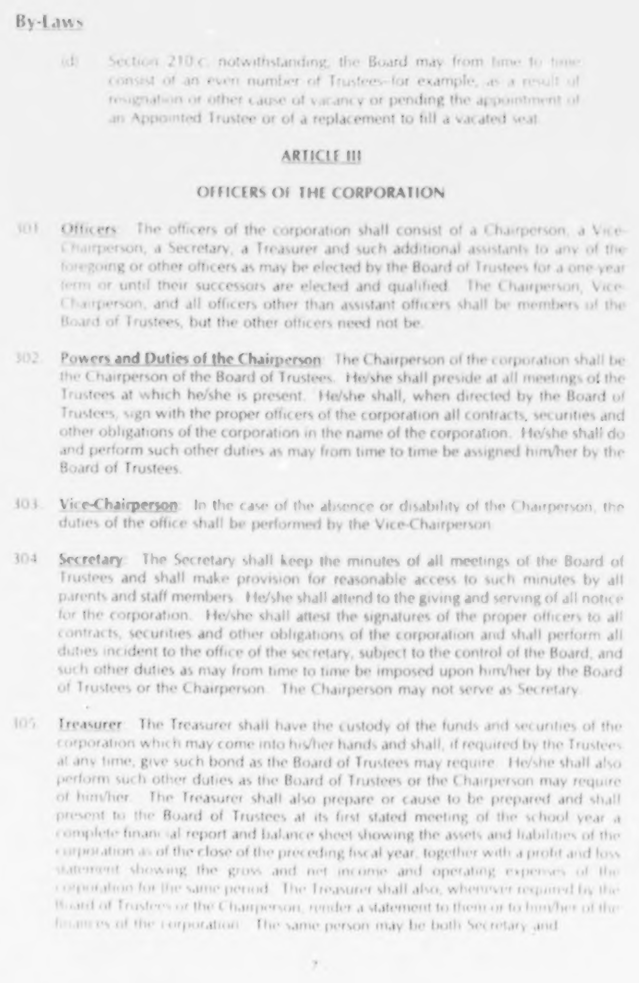
4. At least four seats shall be vacant and subject to election at each annual election.

5. In the event the terms of office of fewer than four Parent Trustees are subject to expiration at the time of an annual election, Parent Trustees with unexpired terms shall draw lots to determine by random selection which of their seats shall be subject to election. This provision applies especially but not exclusively to the April 1985 election and shall be the method for determining which of the 8 Parent Trustees elected in the special 1984 election shall be deemed to have completed their terms of service after one year.

(b) Staff Trustees. Staff Trustees shall be elected by the vote of the full-time teaching staff plus any other employees of the school determined to be eligible to vote by the full-time teaching staff according to the requirements set forth below in Section 505.b.

(c) Other Trustees. As soon as practicable after the annual election, the Board of Trustees shall meet to determine those additional individuals it will appoint to the Board. The Trustees shall appoint no fewer than one nor more than three additional members, provided only that the total of Appointed Trustees, Parent Trustees, Staff Trustees and the Director be an odd number.

Bylaws, Metropolitan Montessori School (continued)



By-Laws

(d) Section 210.c. notwithstanding, the Board may from time to time consist of an even number of Trustees–for example, as a result of resignation or other cause of vacancy or pending the appointment of an Appointed Trustee or of a replacement to fill a vacated seat.

ARTICLE III

OFFICERS OF THE CORPORATION

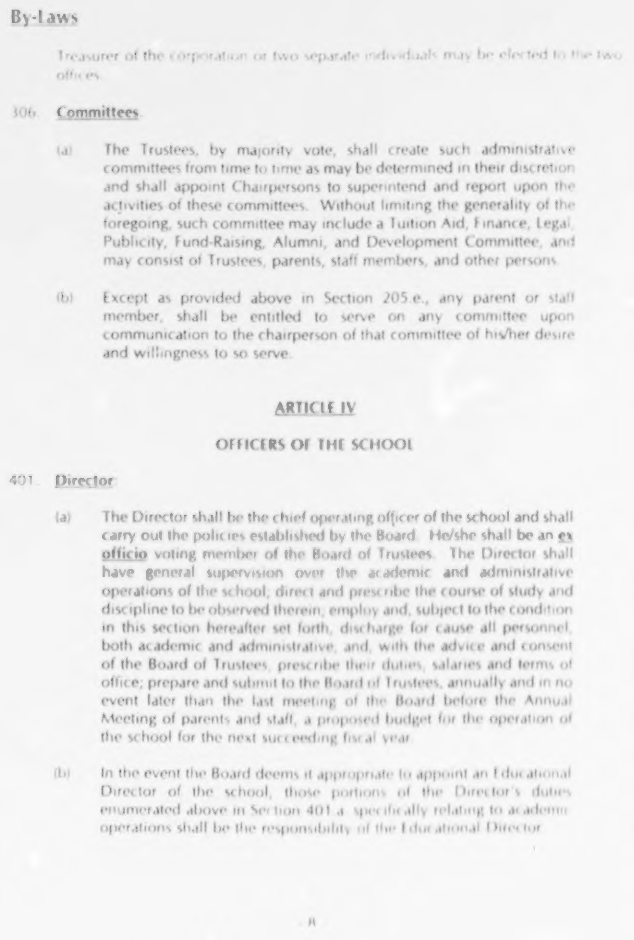
301. **Officers**: The officers of the corporation shall consist of a Chairperson, a Vice-Chairperson, a Secretary, a Treasurer and such additional assistants to any of the foregoing or other officers as may be elected by the Board of Trustees for a one-year term or until their successors are elected and qualified. The Chairperson, Vice-Chairperson, and all officers other than assistant officers shall be members of the Board of Trustees, but the other officers need not be.

302. **Powers and Duties of the Chairperson**: The Chairperson of the corporation shall be the Chairperson of the Board of Trustees. He/she shall preside at all meetings of the Trustees at which he/she is present. He/she shall, when directed by the Board of Trustees, sign with the proper officers of the corporation all contracts, securities and other obligations of the corporation in the name of the corporation. He/she shall do and perform such other duties as may from time to time be assigned him/her by the Board of Trustees.

303. **Vice-Chairperson**: In the case of the absence or disability of the Chairperson, the duties of the office shall be performed by the Vice-Chairperson.

304. **Secretary**: The Secretary shall keep the minutes of all meetings of the Board of Trustees and shall make provision for reasonable access to such minutes by all parents and staff members. He/she shall attend to the giving and serving of all notice for the corporation. He/she shall attest the signatures of the proper officers to all contracts, securities and other obligations of the corporation and shall perform all duties incident to the office of the secretary, subject to the control of the Board, and such other duties as may from time to time be imposed upon him/her by the Board of Trustees or the Chairperson. The Chairperson may not serve as Secretary.

305. **Treasurer**: The Treasurer shall have the custody of the funds and securities of the corporation which may come into his/her hands and shall, if required by the Trustees at any time, give such bond as the Board of Trustees may require. He/she shall also perform such other duties as the Board of Trustees or the Chairperson may require of him/her. The Treasurer shall also prepare or cause to be prepared and shall present to the Board of Trustees at its first stated meeting of the school year a complete financial report and balance sheet showing the assets and liabilities of the corporation as of the close of the preceding fiscal year, together with a profit and loss statement showing the gross and net income and operating expenses of the corporation for the same period. The Treasurer shall also, whenever required by the Board of Trustees or the Chairperson, render a statement to them or to him/her of the finances of the corporation. The same person may be both Secretary and Treasurer of the corporation or two separate individuals may be elected to the two offices.



By-Laws

306. **Committees**.

(a) The Trustees, by majority vote, shall create such administrative committees from time to time as may be determined in their discretion and shall appoint Chairpersons to superintend and report upon the activities of these committees. Without limiting the generality of the foregoing, such committee may include a Tuition Aid, Finance, Legal, Publicity, Fund-Raising, Alumni, and Development Committee, and may consist of Trustees, parents, staff members, and other persons.

(b) Except as provided above in Section 205.e., any parent or staff member, shall be entitled to serve on any committee upon communication to the chairperson of that committee of his/her desire and willingness to so serve.

ARTICLE IV

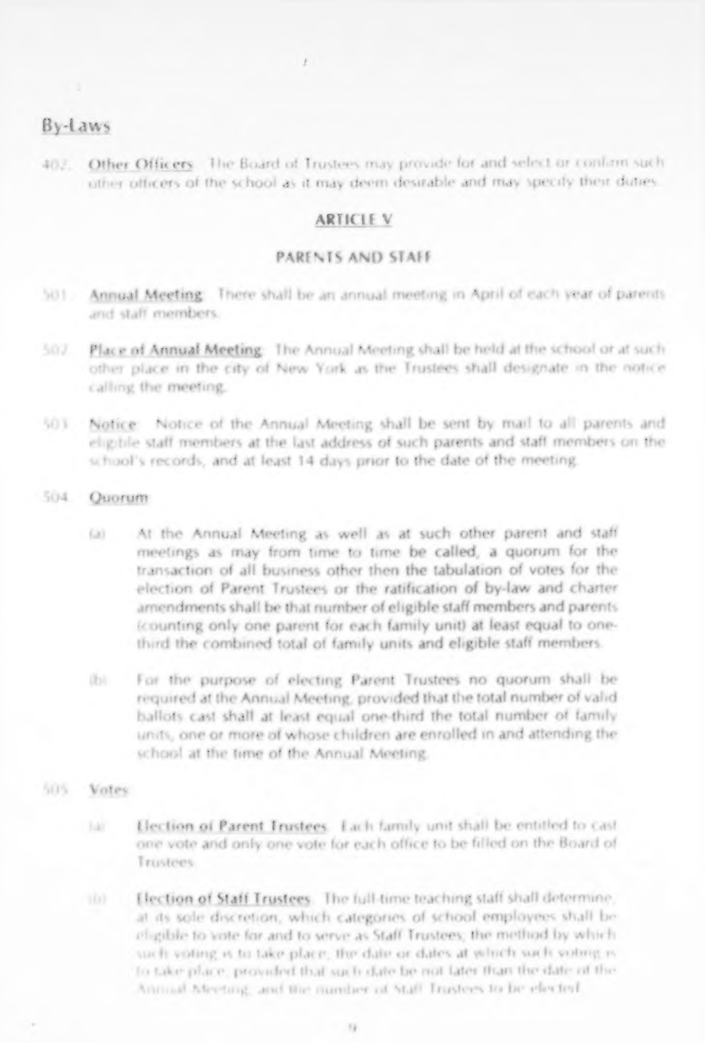
OFFICERS OF THE SCHOOL

401. **Director**:

(a) The Director shall be the chief operating officer of the school and shall carry out the policies established by the Board. He/she shall be an **ex officio** voting member of the Board of Trustees. The Director shall have general supervision over the academic and administrative operations of the school; direct and prescribe the course of study and discipline to be observed therein; employ and, subject to the condition in this section hereafter set forth, discharge for cause all personnel, both academic and administrative, and, with the advice and consent of the Board of Trustees, prescribe their duties, salaries and terms of office; prepare and submit to the Board of Trustees, annually and in no event later than the last meeting of the Board before the Annual Meeting of parents and staff, a proposed budget for the operation of the school for the next succeeding fiscal year.

(b) In the event the Board deems it appropriate to appoint an Educational Director of the school, those portions of the Director's duties enumerated above in Section 401.a. specifically relating to academic operations shall be the responsibility of the Educational Director.

Bylaws, Metropolitan Montessori School (continued)



402. **Other Officers**. The Board of Trustees may provide for and select or confirm such other officers of the school as it may deem desirable and may specify their duties.

ARTICLE V

PARENTS AND STAFF

501. **Annual Meeting**: There shall be an annual meeting in April of each year of parents and staff members.

502. **Place of Annual Meeting**: The Annual Meeting shall be held at the school or at such other place in the city of New York as the Trustees shall designate in the notice calling the meeting.

503. **Notice**: Notice of the Annual Meeting shall be sent by mail to all parents and eligible staff members at the last address of such parents and staff members on the school's records, and at least 14 days prior to the date of the meeting.

504. **Quorum**

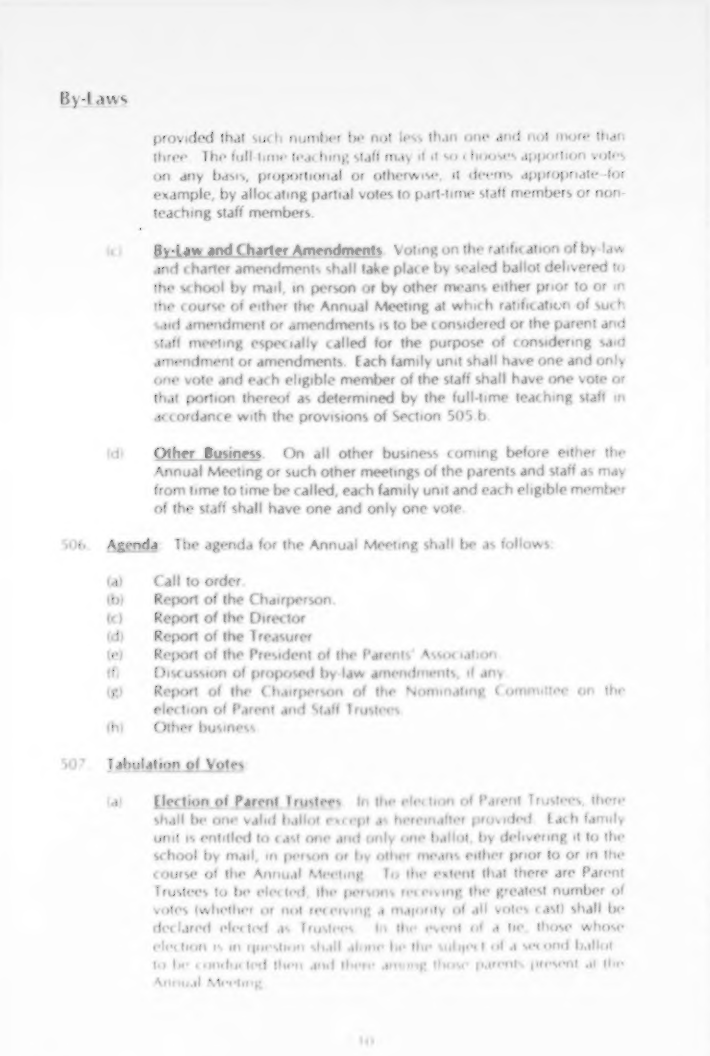
(a) At the Annual Meeting as well as at such other parent and staff meetings as may from time to time be called, a quorum for the transaction of all business other then the tabulation of votes for the election of Parent Trustees or the ratification of by-law and charter amendments shall be that number of eligible staff members and parents (counting only one parent for each family unit) at least equal to one-third the combined total of family units and eligible staff members.

(b) For the purpose of electing Parent Trustees no quorum shall be required at the Annual Meeting, provided that the total number of valid ballots cast shall at least equal one-third the total number of family units, one or more of whose children are enrolled in and attending the school at the time of the Annual Meeting.

505. **Votes**:

(a) **Election of Parent Trustees**. Each family unit shall be entitled to cast one vote and only one vote for each office to be filled on the Board of Trustees.

(b) **Election of Staff Trustees**. The full-time teaching staff shall determine, at its sole discretion, which categories of school employees shall be eligible to vote for and to serve as Staff Trustees, the method by which such voting is to take place, the date or dates at which such voting is to take place, provided that such date be not later than the date of the Annual Meeting, and the number of Staff Trustees to be elected,



provided that such number be not less than one and not more than three. The full-time teaching staff may if it so chooses apportion votes on any basis, proportional or otherwise, it deems appropriate–for example, by allocating partial votes to part-time staff members or non-teaching staff members.

(c) **By-Law and Charter Amendments**. Voting on the ratification of by-law and charter amendments shall take place by sealed ballot delivered to the school by mail, in person or by other means either prior to or in the course of either the Annual Meeting at which ratification of such said amendment or amendments is to be considered or the parent and staff meeting especially called for the purpose of considering said amendment or amendments. Each family unit shall have one and only one vote and each eligible member of the staff shall have one vote or that portion thereof as determined by the full-time teaching staff in accordance with the provisions of Section 505.b.

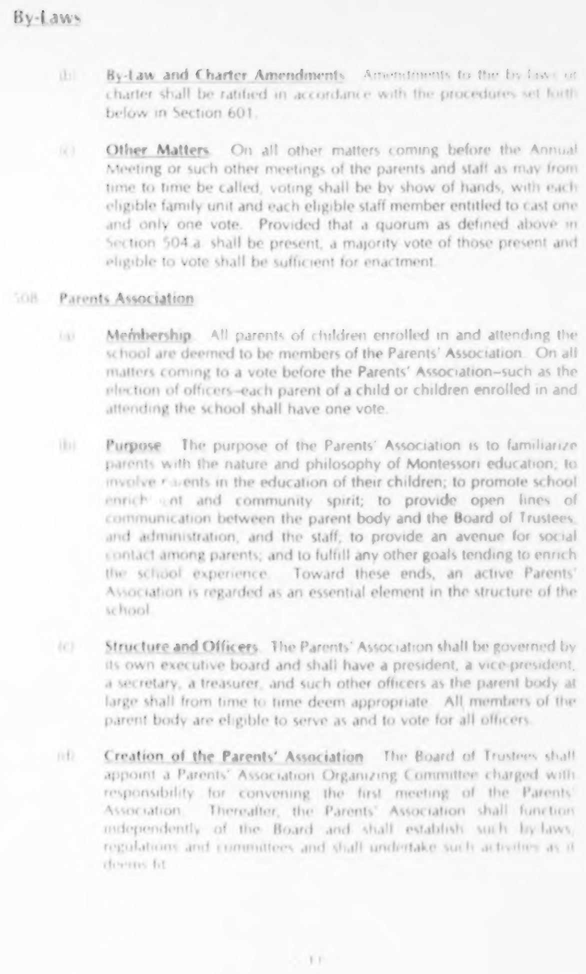
(d) **Other Business**. On all other business coming before either the Annual Meeting or such other meetings of the parents and staff as may from time to time be called, each family unit and each eligible member of the staff shall have one and only one vote.

506. **Agenda**: The agenda for the Annual Meeting shall be as follows:

(a) Call to order.
(b) Report of the Chairperson.
(c) Report of the Director
(d) Report of the Treasurer
(e) Report of the President of the Parents' Association.
(f) Discussion of proposed by-law amendments, if any.
(g) Report of the Chairperson of the Nominating Committee on the election of Parent and Staff Trustees.
(h) Other business.

507. **Tabulation of Votes**:

(a) **Election of Parent Trustees**. In the election of Parent Trustees, there shall be one valid ballot except as hereinafter provided. Each family unit is entitled to cast one and only one ballot, by delivering it to the school by mail, in person or by other means either prior to or in the course of the Annual Meeting. To the extent that there are Parent Trustees to be elected, the persons receiving the greatest number of votes (whether or not receiving a majority of all votes cast) shall be declared elected as Trustees. In the event of a tie, those whose election is in question shall alone be the subject of a second ballot to be conducted then and there among those parents present at the Annual Meeting.



By-Laws

(b) **By-Law and Charter Amendments**. Amendments to the by-laws or charter shall be ratified in accordance with the procedures set forth below in Section 601.

(c) **Other Matters**. On all other matters coming before the Annual Meeting or such other meetings of the parents and staff as may from time to time be called, voting shall be by show of hands, with each eligible family unit and each eligible staff member entitled to cast one and only one vote. Provided that a quorum as defined above in Section 504.a. shall be present, a majority vote of those present and eligible to vote shall be sufficient for enactment.

508. **Parents Association**

(a) **Membership**. All parents of children enrolled in and attending the school are deemed to be members of the Parents' Association. On all matters coming to a vote before the Parents' Association–such as the election of officers–each parent of a child or children enrolled in and attending the school shall have one vote.

(b) **Purpose**. The purpose of the Parents' Association is to familiarize parents with the nature and philosophy of Montessori education; to involve parents in the education of their children; to promote school enrichment and community spirit; to provide open lines of communication between the parent body and the Board of Trustees, and administration, and the staff; to provide an avenue for social contact among parents; and to fulfill any other goals tending to enrich the school experience. Toward these ends, an active Parents' Association is regarded as an essential element in the structure of the school.

(c) **Structure and Officers**. The Parents' Association shall be governed by its own executive board and shall have a president, a vice-president, a secretary, a treasurer, and such other officers as the parent body at large shall from time to time deem appropriate. All members of the parent body are eligible to serve as and to vote for all officers.

(d) **Creation of the Parents' Association**. The Board of Trustees shall appoint a Parents' Association Organizing Committee charged with responsibility for convening the first meeting of the Parents' Association. Thereafter, the Parents' Association shall function independently of the Board and shall establish such by-laws, regulations and committees and shall undertake such activities as it deems fit.

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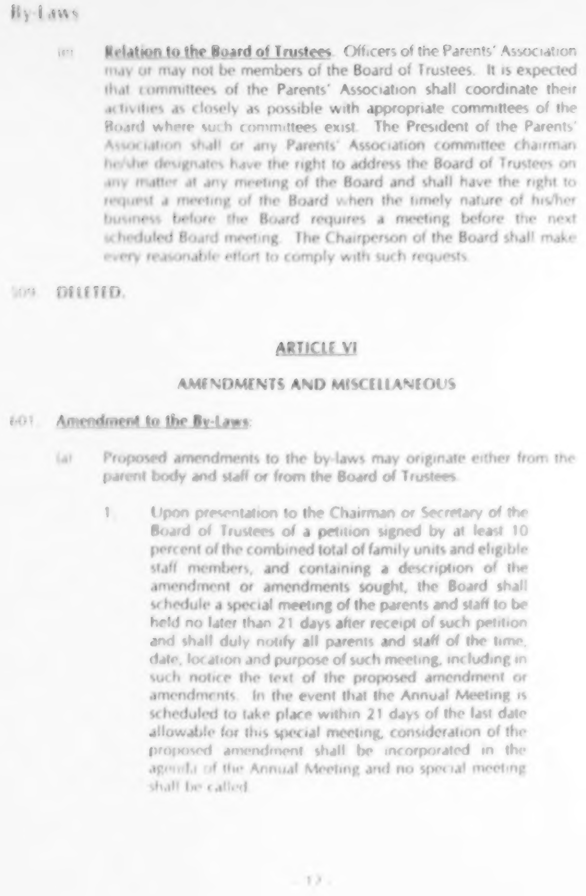

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(m) **Relation to the Board of Trustees**. Officers of the Parents' Association may or may not be members of the Board of Trustees. It is expected that committees of the Parents' Association shall coordinate their activities as closely as possible with appropriate committees of the Board where such committees exist. The President of the Parents' Association shall or any Parents' Association committee chairman he/she designates have the right to address the Board of Trustees on any matter at any meeting of the Board and shall have the right to request a meeting of the Board when the timely nature of his/her business before the Board requires a meeting before the next scheduled Board meeting. The Chairperson of the Board shall make every reasonable effort to comply with such requests.

509. DELETED.

ARTICLE VI

AMENDMENTS AND MISCELLANEOUS

601. **Amendment to the By-Laws**:

(a) Proposed amendments to the by-laws may originate either from the parent body and staff or from the Board of Trustees.

1. Upon presentation to the Chairman or Secretary of the Board of Trustees of a petition signed by at least 10 percent of the combined total of family units and eligible staff members, and containing a description of the amendment or amendments sought, the Board shall schedule a special meeting of the parents and staff to be held no later than 21 days after receipt of such petition and shall duly notify all parents and staff of the time, date, location and purpose of such meeting, including in such notice the text of the proposed amendment or amendments. In the event that the Annual Meeting is scheduled to take place within 21 days of the last date allowable for this special meeting, consideration of the proposed amendment shall be incorporated in the agenda of the Annual Meeting and no special meeting shall be called.

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2. Upon majority vote of the Board approving a motion requesting amendment to the by-laws and describing the amendment or amendments sought, the Board shall make arrangements for a meeting of parents and staff as set forth above in Section 601.a.1.

(b) The proposed amendment or amendments shall be examined and discussed at the Annual Meeting or special meeting called for this purpose. At the conclusion of such discussion, the staff and parents present at the meeting shall elect, by majority vote, one of the principal forwarders of the proposed amendment or amendments to serve as chairman of an Ad Hoc By-law Amendment Committee. The purpose of such committee shall be to reexamine the amendment or amendments in light of the information and ideas gained from discussion at the meeting and to make such revisions as the committee deems desirable.

(c) Upon completion of its deliberations, the committee shall present the amendment or amendments in their final form, together with such explanatory statements as it wishes to have circulated with the text of the amendments, to the Secretary of the Board. The Secretary shall mail or cause to be mailed to all parents and eligible staff members the text of the amendment or amendments and any additional statements together with an appropriate ballot form on which is indicated the date by which the ballot must be returned to the school, such date to be 30 days from the date of the mailing.

(d) The vote on ratification of amendments to the by-laws shall be conducted by sealed ballot. Each family unit is entitled to cast one and only one ballot. Each eligible staff member may cast one and only one ballot, representing either a whole vote or such portion thereof as has been dully determined in accordance with the provisions set forth above in Section 505.b. Ballots may be cast by delivering them to the school by mail, in person or by other means on or prior to the deadline indicated on the ballot. All ballots shall be counted on an amendment-by-amendment basis if more than one amendment is under consideration, and those and only those amendments shall be incorporated in the by-laws as receive affirmative votes totaling at least one more than half the total number of eligible family units plus eligible staff members, regardless of the number of ballots actually cast.

(e) All ratified amendments shall be effective immediately unless otherwise specified in the language of the amendment or except as provided below in Section 602.

602 **Charter Amendments**. A proposal to revise the charter is to be adopted by the same procedure outlined above in Section 601 for by-law amendments. Consequential amendments to these by-laws may be adopted simultaneously with such proposal but shall not be in force until notice has been given of revision of the charter by the Regents of the State University of New York.

603 **Definitions**:

(a) The terms "parent" and "parents" as used herein shall mean a person or persons in whole lawful custody and control a child or children enrolled in and attending the school may, from time to time, be.

(b) Whenever the context so requires, the use of the terms "he" or "she" in these by-laws, or any other term or phrase in the masculine or feminine, shall not be deemed to restrict the application of such term, phrase or provision by reason of a person's gender.

(c) The terms "staff" or "staff member" as used herein shall mean any employee of the school; the term "eligible staff" or "eligible staff member" shall mean any staff member eligible to perform the relevant functions, such as voting or standing for election, as such eligibility is determined in accordance with the provisions of Section 505.b., above.

(d) The term "family unit" as used herein shall mean the parent or parents regarded collectively as a single unit of a child or children enrolled in and attending the school.

Metropolitan Montessori School admits students of any race, color, national or ethnic origin to all the rights, privileges, programs and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, national and ethnic origin in administration of its educational policies, admissions policies, scholarship programs and other school-administered programs.

Committee Assignments and Task Lists, The Post Oak School (Bellaire, TX)

'96-'97 Committee Assignments

		Committee
	Executive	
1.	Fondren, Leland	Executive Trustee Head Eval
2.	Carter, Jeanie	Executive Development
3.	Basinger, Scott F.	Executive Long Range Plann Head Eval
4.	Wallace, John	Executive Long Range Plann Head Eval
5.	Harrell, Melanie	Executive Finance
	Finance	
1.	Harrell, Melanie	Executive Finance
2.	Botkin, Jeffri	Finance
3.	Kurji, Naushad	Finance
	Development	
1.	Carter, Jeanie	Executive Development
2.	Buschor, Joan	Development
3.	Mathre, Lynn	Development
4.	Boyer, Pam	Development
	Long Range Planning	
1.	Wallace, John	Executive Long Range Plann Head Eval
2.	King, Carol L.	Long Range Plann
3.	Basinger, Scott F.	Executive Long Range Plann Head Eval
	Trustee	
1.	Fondren, Leland	Executive Trustee Head Eval
2.	Best, Beth	Trustee
3.	Murphy, Jenny	Trustee
	Head Eval	
1.	Wallace, John	Executive Long Range Plann Head Eval
2.	Basinger, Scott F.	Executive Long Range Plann Head Eval
3.	Fondren, Leland	Executive Trustee Head Eval

These documents are included in the trustee handbook, providing a clear overview of committee service and responsibilities.

Committee Assignments and Task Lists, The Post Oak School (continued)

Committee Task List

	Committee List
☐ Executive	
1 ▫ Board Organization/Governance	
1 ▫ Re-Evaluate or Rewrite bylaws	▫ Executive
1. ▫ (to include legal review)	
2 ▫ Marketing	
1. ▫ Review mission statement	▫ Executive
☐ Admin	
1 ▫ Marketing	
1 ▫ Slide Show about school	▫ Admin ▫ Board
1. ▫ show what students are doing	
2. ▫ about materials and designs at each level (student developement level)	
2. ▫ Student survey	▫ Admin ▫ Board
1. ▫ what do we ask?	
3. ▫ Develop academic profile for alumns	▫ Admin ▫ Board
1. ▫ sat scores	
2. ▫ colleges attended	
3. ▫ other hard data on past graduates (of MS)	
4 ▫ emphasize safe environment	▫ Admin ▫ Board
5 ▫ Parent education	▫ Admin ▫ Board
1 ▫ give hands on experience	
2. ▫ orientation	
3. ▫ host early morning parent events (8:30 - 11:30)	
4. ▫ baby sitting / child care	
5. ▫ new parent orientation	
1. ▫ include slide show	
2. ▫ resurrect pairing of old/new parents (sponsoring)	
6. ▫ Coordinate with Neuhaus Center for Parent Ed.	
2 ▫ Board Organization/Governance	
1 ▫ Develop parent profile survey and administer	▫ Admin ▫ Development
1. ▫ by Aug. for first of year surveys.	
3 ▫ Development	
1 ▫ Develop plans for MS program and facility	▫ Admin
1. ▫ Plan to be recognized as Model for Montessori MS nationally	
2. ▫ Institute advisory committee to be used as a resource	▫ Admin ▫ Trustee
1. ▫ include non-parents	
2. ▫ community connections	
3. ▫ specific skills	
3 ▫ develop and utilize parent profile	▫ Admin ▫ Trustee
☐ Board	
1 ▫ Marketing	
1. ▫ Slide Show about school	▫ Admin ▫ Board
1. ▫ show what students are doing	
2. ▫ about materials and designs at each level (student developement level)	
2. ▫ Student survey	▫ Admin ▫ Board
1 ▫ what do we ask?	
3 ▫ Develop academic profile for alumns	▫ Admin ▫ Board
1. ▫ sat scores	
2. ▫ colleges attended	
3. ▫ other hard data on past graduates (of MS)	
4 ▫ emphasize safe environment	▫ Admin ▫ Board

Committee Assignments and Task Lists, The Post Oak School (continued)

Committee Task List

Committee List

5. ❑ Parent education ▭ Admin ▭ Board
    1. ❑ give hands on experience
    2. ❑ orientation
    3. ❑ host early morning parent events (8:30 - 11:30)
    4. ❑ baby sitting / child care
    5. ❑ new parent orientation
        1. ❑ include slide show
        2. ❑ resurrect pairing of old/new parents (sponsoring)
    6. ❑ Coordinate with Neuhaus Center for Parent Ed.
2. ❑ Community Outreach ▭ Board
    1. ❑ Participate in West U & Bellaire Chambers of Commerce
    2. ❑ Neigborhood Magazines
    3. ❑ Publicize MS activities to outreach community
    4. ❑ Continue to offer community presentations (ie Lillard)
    5. ❑ Identify city wide school fairs and participate where appropriate
    6. ❑ through ISAS connect with non-mont. schools
    7. ❑ utilize parent contacts w/media
    8. ❑ open house for realators
    9. ❑ take advantage of every speaking opportunity
    10. ❑ seek to diversify enrollment
        1. ❑ questions by LTF
            1. ❑ What is current enrollment profile?
            2. ❑ What is board policy regarding enrollment?
            3. ❑ Diversify to what?
            4. ❑ who answers these questions bd or head/faculty?
    11. ❑ Pursue Montessori training center (elem or MS)
    12. ❑ Support John Long w/national local presentations
        1. ❑ official time off for workshops
        2. ❑ budget for travel
        3. ❑ coordinate with John Long on developing policy
    13. ❑ use available demographic info

▭ Trustee

1. ❑ Board Organization/Governance
    1. ❑ Give to each bd member in Aug. a notebook to include: ▭ Trustee
        1. ❑ Mission Statement
        2. ❑ School Philosophy
        3. ❑ School Charter
        4. ❑ Bylaws
        5. ❑ Trustee Handbook
        6. ❑ Policy Handbook
        7. ❑ This Plan
        8. ❑ Committee Plans
        9. ❑ Minutes
    2. ❑ Develop orientation / retreat for board ▭ Trustee
        1. ❑ plan for Aug. full day meeting
        2. ❑ by Comm. on trustees
    3. ❑ Work on Board Profile ▭ Trustee
        1. ❑ recruiting (areas of expertise per this plan)
        2. ❑ current parents, grand parents, community leaders, former parents
    4. ❑ Develop policy re: util on non bd. members on committees ▭ Trustee
2. ❑ Development
    1. ❑ Trustee Development ▭ Trustee
        1. ❑ Profile
        2. ❑ Raise money
            1. ❑ individual trustees
            2. ❑ connections
    2. ❑ Institute advisory committee to be used as a resource ▭ Admin ▭ Trustee
        1. ❑ include non-parents
        2. ❑ community connections
        3. ❑ specific skills

Committee Assignments and Task Lists, The Post Oak School (continued)

Committee Task List

Committee List

3. ○ develop and utilize parent profile ☐ Admin ☐ Trustee

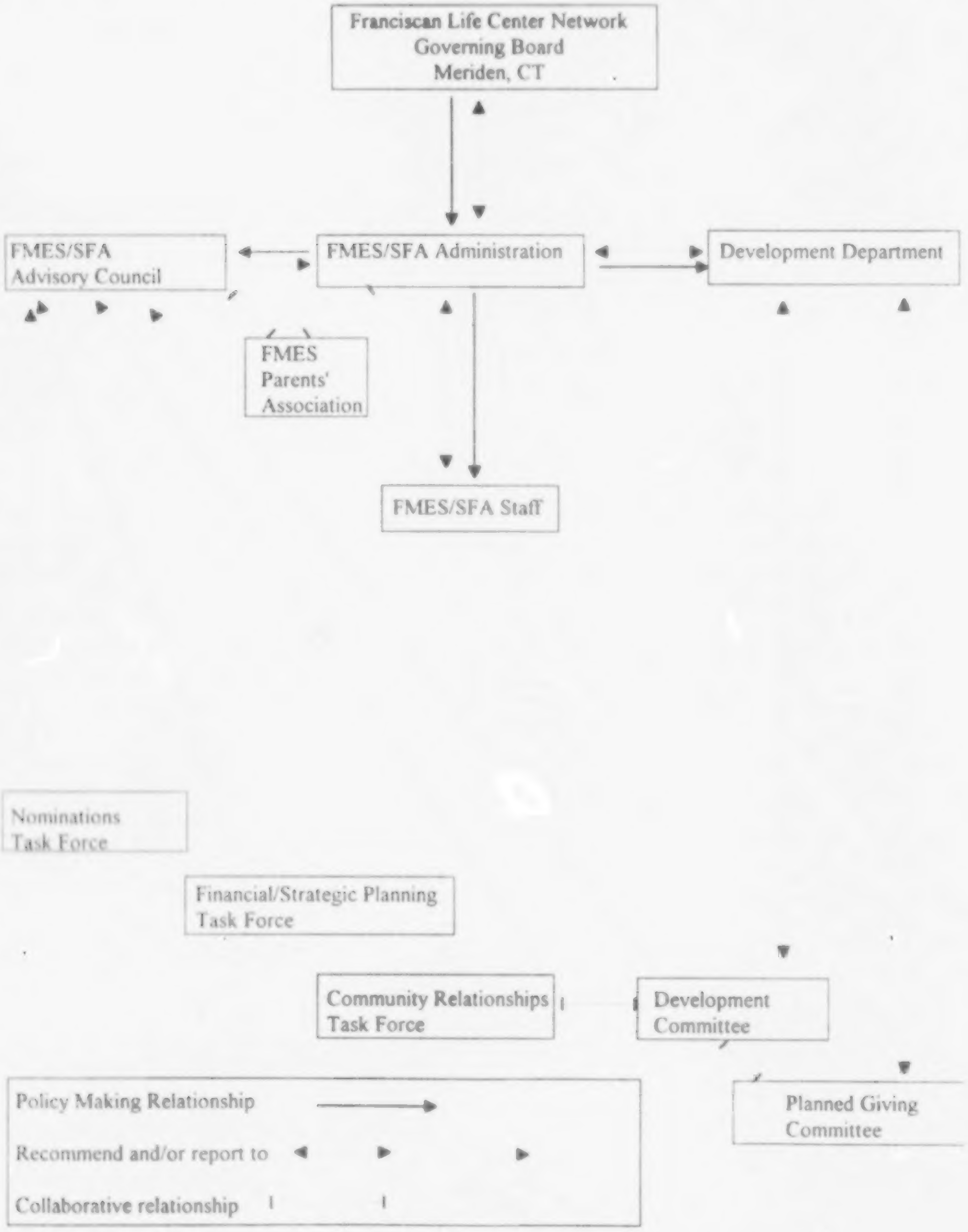
☐ Development
1. ○ Board Organization/Governance
    1. ○ Develop parent profile survey and administer ☐ Admin ☐ Development
        1. ○ by Aug. for first of year surveys.
    2. ○ Develop policy re: POPA/bd relationship ☐ Development
        1. ○ Establish committee to study and recommend...
            1. ○ bd liason to popa
            2. ○ Define popa role (empowering not emasculating)
                1. ○ Board to meet with popa, possably invite popa leadership to bd retreat in Aug
                2. ○ Popa to be treated like extended board committee
            3. ○ Popas role (consisting of bd popa members)
2. ○ Development
    1. ○ Reduce debt by $850,000 next 24 mo. ☐ Development
    2. ○ Develop Capital Campaign to begin 2 yr out (after 1 above) ☐ Development

☐ Finance

☐ Long Range
1. ○ Marketing
    1. ○ Student Retention ☐ Long Range
        1. ○ Written curriculum
        2. ○ large peer group
            1. ○ develop plan for
                1. ○ sports facilities
                2. ○ classroom needs
                    1. ○ elem
                    2. ○ ms
        3. ○ Connect families more
            1. ○ family profile
            2. ○ books
            3. ○ directory
2. ○ Development
    1. ○ Develop a Long Range building plan to address the needs of the school - both current issues and issues of growth. ☐ Long Range
        1. ○ Timetable?

☐ Building & Grounds
1. ○ Development
    1. ○ Develop a Short range building plan as a part of the long range plan. ☐ Building & Gro
        1. ○ develop building standards
        2. ○ develop grounds maintenance plan and budget
            1. ○ include repair of soccar field
            2. ○ investigate possible restart of POS hosting YMCA soccar games
            3. ○ other athletic facilities (eg. use of Faith Lutheran's gym)

Organizational Chart, Franciscan Montessori Earth School (Portland, OR)


Franciscan Life Center Network
Governing Board
Meriden, CT
FMES/SFA Advisory Council
FMES/SFA Administration
Development Department
FMES Parents' Association
FMES/SFA Staff
Nominations Task Force
Financial/Strategic Planning Task Force
Community Relationships Task Force
Development Committee
Planned Giving Committee
Policy Making Relationship
Recommend and/or report to
Collaborative relationship
7

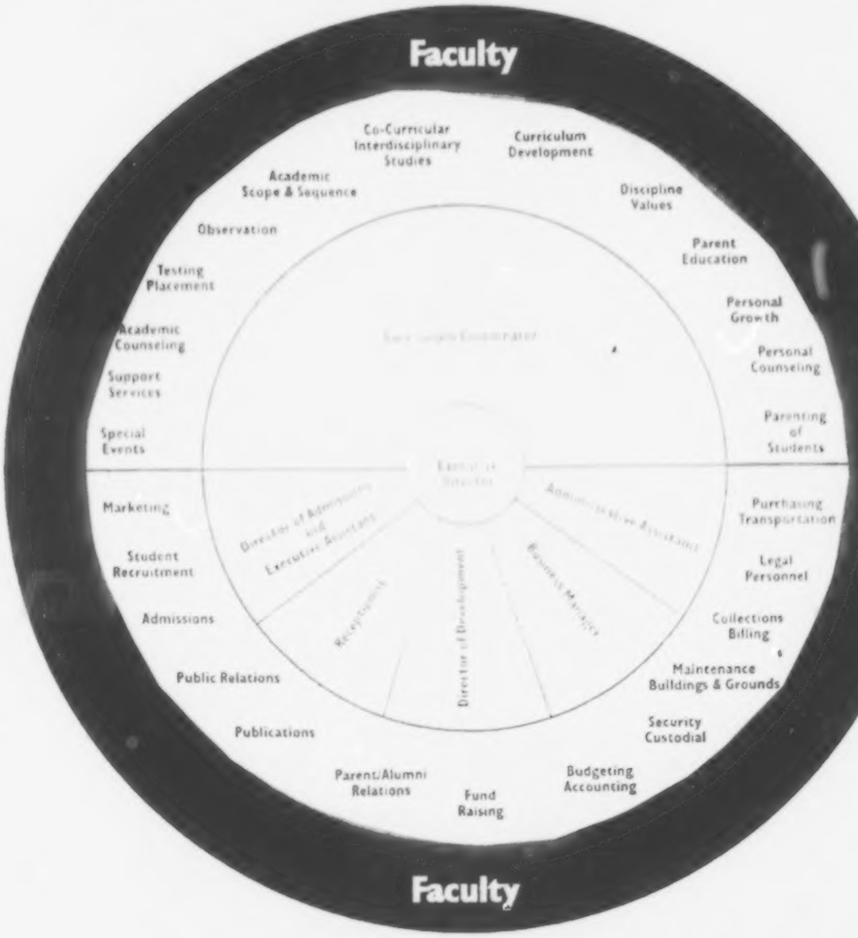
This organizational chart is used to provide clarity about governance, with particular emphasis on committee structure.

Organizational Chart, Montessori School of Raleigh (Raleigh, NC)

Montessori School of Raleigh Management Organizational Chart

INSTRUCTIONAL

PROGRAMS, FUNCTIONS, AND SUPPORT CRITICAL TO STUDENT ADVANCEMENT AND WELL-BEING


Faculty
Co-Curricular Interdisciplinary Studies
Curriculum Development
Academic Scope & Sequence
Discipline Values
Observation
Parent Education
Testing Placement
Personal Growth
Academic Counseling
Personal Counseling
Support Services
Parenting of Students
Special Events
Executive Director
Marketing
Director of Admissions and Executive Assistant
Administrative Assistant
Purchasing Transportation
Student Recruitment
Legal Personnel
Receptionist
Director of Development
Business Manager
Admissions
Collections Billing
Public Relations
Maintenance Buildings & Grounds
Publications
Security Custodial
Parent/Alumni Relations
Fund Raising
Budgeting Accounting
Faculty

INSTITUTIONAL

FUNCTIONS AND SUPPORT CRITICAL TO INSTITUTIONAL ADVANCEMENT AND WELL-BEING

We are grateful to Independent School Management for the organizational model on which this chart is based.

This organizational chart reflects the integrated relationship between program and administration in a larger school with an extensive administrative staff.

Financial Operations

Introduction: Finances Integrate with Program Decisions

Effective reporting of financial activity, a balanced budget, a consistent budget cycle, tuition setting, fundraising, and clear distinctions between operations and capital budgeting are essential to the operation of the school. Beyond these basics, full understanding of the "numbers," which include enrollment projections and related financial projections, is essential to the planning of the school's future.

When a school has a limited budget, the head of school should critically review finances in order to prioritize spending according to what he or she thinks is most important for the school program. For instance, the financial realities of the school determine salary structure, so that the sustaining of quality staff is fostered by a budget that keeps personnel dollars in sufficient supply in relation to all other expenses in the school. There is always competition between capital improvements (e.g., a new building), non-teaching personnel costs, and teacher salaries. Therefore the head of school must determine how much mortgage and other space costs can be assumed without compromising personnel. In short, the head must see clearly that good decision-making is predicated on the integration of financial and program factors.

Business System

Bookkeeping System

A school's bookkeeping system should be designed to record and summarize the financial data required for successful school operation. An accountant should be consulted when setting up the system. There are many easy-to-use computer accounting systems to choose from; some well-known titles include Quicken, QuickBooks, and OneWrite Plus. Some accounting packages are designed specifically for use by nonprofit organizations.

Some smaller schools, however, find it adequate to keep their books by hand. With this method, all transactions and adjustments are recorded in one of five journals: Revenues, Cash Receipts, Cash Disbursements, Payroll, and General. Time can be saved and errors reduced by using a "single-write" system, whereby one-time entries are carbon copied to the appropriate journals. Depending on the number of employees and the fees charged by local service providers, it may be cost-effective to outsource payroll and related tax reporting services.

The Internet Nonprofit Center offers a comparison of nonprofit accounting packages, with cost information, in its Frequently Asked Questions at www.nonprofits.org/npofaq.

Integrated Accounting Software Package and Database

A computerized financial system with an in-house operator is usually the best way to go. These systems operate with one database of all school families, allowing the computer to print out class lists; school rosters with each family's name, address, phone, and names of children enrolled; billing and collections, including charges for after-school or other optional programs; volunteer tracking; etc. They also integrate payroll, cash receipts and expenditures, and financial reporting, eliminating duplicate data entry and the related risk of error. Such a system requires an integrated package of office programs (word processor, spreadsheet, and database) plus an accounting package.

Many schools use Microsoft Office Professional (which includes the word processing program Word, the spreadsheet program Excel, and the database program Access) along with the accounting package QuickBooks. QuickBooks Pro 99, the latest version of the package, integrates well with Office applications: A spreadsheet created in Excel, for example, can be imported into QuickBooks. QuickBooks handles all of the school's finances, including budgeting, financial reporting, tuition tracking, billing, etc. Double data entry is eliminated by importing names and addresses from the Access database into QuickBooks to generate invoices, etc.

All of the Microsoft Office programs integrate with each other as well. Form letters, for instance, can be generated by importing names and addresses from Access into a letter written in Word. Access can be particularly helpful for recruiting: tracking inquiries, doing mailings, etc.

Most schools will need to have a consultant set up the necessary tables, forms, queries, and reports to make any database program truly useful. That way, the office staff simply enters the data (families' names and addresses, for instance), and the database generates class rosters, mailing labels, recruiting reports, annual giving reports, etc. A consulting firm can charge $10,000 or more to customize a database, but it is often possible to find a friend of the school who can do it for a reasonable hourly rate, cutting the cost to $2,000 or less.

The consultant needs to have a firm understanding of the school's office procedures in order to set up all the features the staff is likely to need. It is desirable for the agreement with the consultant to include a period of time for making adjustments and adding features at a minimal charge. The change-over to the new system should be implemented at a slow time of year; there will be a few bugs to work out and some procedures to add that were forgotten in the planning process.

The consultant should train the office staff to use the custom features that have been designed into the database. However, in order to avoid additional consultant charges later, at least one staff member should take a course on the particular database software in order to learn how to write queries and design reports as they are needed.

Bookkeeping Practices and Spending Authority

Standard operating procedures for bookkeeping should be followed. Most important is that the treasurer establish a policy for financial operations, such as check signing functions, petty cash policy, expenditure approval policy, and a schedule of daily, weekly, monthly, and annual bookkeeping events (see Old Brooklyn Montessori School financial procedures in this chapter's Sample Documents). Significant spending requests by the head should be discussed with the treasurer or business manager prior to board meetings so that they may be fully reconciled with the budget. Ideally, the treasurer or business manager should present the expenditure at the board meeting as a recommendation.

Payroll Considerations

When a payroll is first set up, it should be reviewed by a CPA for compliance with all federal, state, and municipal laws regarding the management of personnel wages.

Schools may elect to reimburse unemployment, thereby exempting themselves from unemployment tax, which can save funds in many states. This should be researched on the state level. Schools that elect to self-insure may hold money in escrow, take out a surety bond or a letter of credit, or show negotiable bonds to satisfy exemption status.

Schools that self-insure must be particularly careful to document all personnel evaluations and employment relations. This provides protection in case an employee who has been terminated for cause attempts to collect unemployment reimbursement.

There is new terminology for some reports used in nonprofit bookkeeping. What used to be called a *balance sheet* is now referred to as a *statement of financial position*; the old term *income statement* has been replaced by *statement of activities*. While some bookkeepers and accountants still use the old terms conversationally, the new ones should be used on all official documents.

Monthly or Quarterly Reporting

A *monthly financial report* can help keep school finances accessible to the board of trustees, but some boards find quarterly reports adequate. In either case, the report totals all accounts (both income and expenses) after reconciliation of bank state-

Monthly Report
for Eighth Period, Ending February 28, 19xx

	February Actual	Year-to-Date Actual	Annual Budget
REVENUES			
Operational			
Preschool Tuition	$ -	$ 266,125	$ 264,600
Elementary Tuition	$ -	$ 122,499	$ 112,585
Middle School Tuition	$ -	$ 109,800	$ 111,600
Ext. Day Tuition	$ -	$ 10,134	$ 9,750
After-School Fees	$ 90	$ 551	$ 750.00
Application Fees	$ 460	$ 2,090	$ 3,750.00
Parent Assoc. Dues	$ -	$ 1,819	$ 1,600
Interest	$ 4,214	$ 9,309	$ 12,500
Misc.	$ 4,049	$ 19,965	$ 22,200
Subtotal	$ 8,813	$ 542,292	$ 539,335
Fundraising			
Annual Giving	$ 1,196	$ 16,006	$ 15,000
Golf Concessions	$ -	$ 9,860	$ 10,000
Magazine Sale	$ -	$ -	$ 2,500
Garage Sale	$ -	$ 125	$ 100
Subtotal	$ 1,196	$ 25,991	$ 27,600
Restricted Capital Income			
Capital Fund	$ 150	$ 1,374	$ 5,000
Subtotal	$ 150	$ 1,374	$ 5,000
Total Support and Revenue:	$ 10,159	$ 569,657	$ 571,935
EXPENSES			
People-Related			
Salaries	$ 28,185	$ 193,203	$ 342,485
Payroll Taxes	$ 1,973	$ 15,213	$ 26,100
Benefits	$ 1,003	$ 15,136	$ 23,892
Prof. Development	$ 275	$ 3,704	$ 3,000
Financial Assistance	$ -	$ 7,266	$ 7,306
Subtotal	$ 31,436	$ 234,522	$ 402,783
Class-Related			
Books	$ -	$ 445	$ 800
Supplies	$ 676	$ 8,751	$ 10,700
Services	$ 1,196	$ 11,692	$ 24,585
Subtotal	$ 1,872	$ 20,888	$ 36,085
Administrative			
Postage/Printing	$ 140	$ 908	$ 1,300.00
Insurance	$ -	$ 7,876	$ 9,000.00
Equip. Maint./Repair	$ -	$ 1,011	$ 1,000.00
Audit	$ -	$ 3,251	$ 3,000.00
Parent Assoc. Exp.	$ 150	$ 1,054	$ 1,600.00
Washes	$ (69)	$ 29	$ -
Misc.	$ 10	$ 489	$ 1,500.00
Subtotal	$ 231	$ 14,618	$ 17,400
Space-Related			
Mortgage	$ 9,608	$ 23,440	$ 35,160
Utilities	$ 2,401	$ 16,529	$ 25,000
Supplies	$ -	$ 2,151	$ 6,000
Bldg. Maintenance	$ 125	$ 3,668	$ 6,000
Property Tax	$ -	$ -	$ -
Depreciation	$ 141	$ 8,335	$ 12,500
Subtotal	$ 12,275	$ 54,123	$ 84,660
Total Expenses:	$ 45,814	$ 324,151	$ 540,928
Total Revenues over Expenses Before Capital Expenses:	$ (35,655)	$ 245,506	$ 31,007
Capital Expenses			
Major Repairs	$ -	$ 7,800.00	$ 10,000
New Furn. & Fixtures	$ -	$ 5,940.00	$ 10,000
Subtotal	$ -	$ 13,740	$ 20,000
Total Revenues over Expenses After Capital Expenses:	$ (35,655)	$ 231,766	$ 11,007

Figure 1

ments. The report has columns for the monthly or quarterly total of each account, the year-to-date total of each account, and the budget for each account to facilitate comparison of budget to actual as the year progresses (see Figure 1). The monthly or quarterly report should show detailed backup information for any account with a sudden change or discrepancy from the budget. A *statement of financial position* (balance sheet) should accompany the report to give the board an idea of cash level and allocation, including depreciation factors (see Figure 2).

Chart of Accounts

The *chart of accounts* establishes the classifications to be used for income and expenses. Its line items are reflected on all reports (monthly, annual, etc.). It may prove useful to categorize the line items into groups that conform to the 990 tax forms so that program and administration costs are separated according to IRS guidelines. In addition, placing line items in groups such as *personnel, administrative, space-related, fundraising,* and *capital improvement* makes sub-totals for each of these categories accessible and useful in budget decision making (see Figure 3).

Capital versus Operational Expenses

Board members and the head of school must understand the distinction between operational and capital expenses. Operating expenses refer to the usual annual budget of the school and are covered by tuition. Capital expenses are usually one-time in nature and refer to building improvement, furniture, and fixtures, including playground equipment.

Usually capital expenses are covered by a capital campaign rather than by tuition revenues. The head must make sure that there is sufficient capital to meet anticipated capital expenses and that capital expenditures are not charged to the operating budget, especially at the beginning phases of a school development.

BEST COPY AVAILABLE

Statement of Financial Position
February 28, 19xx

ASSETS		
Current Assets		
Cash in Bank	$ 113.30	
Cash-Payroll Checking	$ 3,645.17	
Cash-General Savings	$ 405.80	
Athletic Fund	$ (300.00)	
Scholarship Fund	$ (478.00)	
Cert. of Deposit	$ 46,958.83	
Investments	$ 370,304.81	
Accts. Receivable	$ 24,461.05	
Prepaids	$ -	
Other Current Assets	$ 6,147.54	
Other Assets	$ 5,788.19	
Total Current Assets	$ 457,046.69	
Fixed Assets		
Learning Materials	$ 46,949.54	
Accum Deprec.-Materials	$ (20,892.00)	
Furniture & Fixtures	$ 83,246.03	
Accum Deprec.-Furn/Fix.	$ (26,719.00)	
Building	$ 965,842.77	
Accum Deprec.-Bldg.	$ (90,716.00)	
Land	$ 8,500.00	
Total Fixed Assets	$ 966,211.34	
Total Assets		$ 1,423,258.03
LIABILITIES AND NET ASSETS		
Current Liabilities		
Accts. Payable	$ -	
Fed. With. Tax	$ 33.30	
F.I.C.A.	$ (16.74)	
State With. Tax	$ 1,145.38	
City With. Tax	$ 402.74	
Security Deposits*	$ 26,325.00	
Total Current Liabilities	$ 27,889.68	
Long-Term Liabilities		
Mortgage Payable	$ 194,270.09	
Second Mortgage Payable	$ 196,388.50	
Deferred Revenues	$ 6,709.66	
Total Long-Term Liabilities	$ 397,368.25	
Total Liabilities	$ 425,257.93	
Net Assets		
Total Net Assets	$ 998,000.10	
Total Liabilities and Net Assets		$ 1,423,258.03

*Note: Security deposits are charged to families when they enroll a child at the beginning of a cycle (Preschool, Elementary, etc.) as part of the agreement to keep their child in the school for the entire cycle. If the child stays through the cycle, the deposit is refunded; if not, it is forfeited.

Figure 2.

Categorizing Operations: The Chart of Accounts

Revenues

Operational Income
- Preschool Tuition
- Elementary Tuition
- Middle School Tuition
- Extended Day Tuition
- After-School Fees
- Application Fees
- Parent Assoc. Dues
- Scholarships
- Interest
- Misc.

Subtotal

Fundraising Income
- Annual Giving
- Golf Concessions
- Magazine Sale
- Garage Sale
- Other

Subtotal

Restricted Capital Income
- Capital Fund

Subtotal

Total Support and Revenue

Expenses

People-Related
- Salaries
- Payroll Taxes
- Benefits
- Professional Development
- Faculty Financial Assistance

Subtotal

Class-Related
- Books
- Supplies
- Services

Subtotal

Administrative
- Postage and Printing
- Insurance
- Equipment Maintenance & Repair
- Audit
- Scholarships
- Parent Assoc. Expenses
- Washer
- Misc.

Subtotal

Space-Related
- Mortgage
- Utilities
- Supplies
- Building Maintenance
- Property Tax
- Depreciation

Subtotal

Fundraising Expenses
- Annual Giving
- Golf Concessions
- Magazine Sale
- Garage Sale
- Other

Subtotal

Capital Items
- Major Repairs
- New Furniture & Fixtures
- New Building (Expansion)
- Vehicles

Subtotal

Total Expenses

Figure 3.

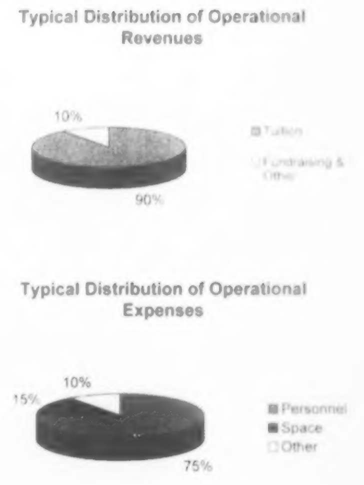


Figure 4.

Budget Considerations

As shown in Figure 4, usually up to 90% of the school's income is tuition; the remaining 10% is made up by fundraising, interest on reserve funds, or annual giving. Generally speaking, school tuition should cover operating expenses, although there are some schools (usually in the beginning stages) that allow fundraising to subsidize tuition, keeping tuition at a minimum

See Chapters 13-15 for information on fundraising, capital campaigns, and long-range planning.

Sample Budget with Assumptions

REVENUES

Line Item	*Amount*	*Assumption*
Operational Income		
Preschool Tuition		# of students x tuition
Elementary Tuition		# of students x tuition
Junior High Tuition		# of students x tuition
Extended Day Tuition		# of students x tuition
After School Fees		# of students x tuition
Application Fees		# of applicants x fee
Parent Association Dues		number of families x dues fee
Scholarships		two tuitions per age level
Interest		6% of capital reserve
Misc.		any revenues not covered above
Subtotal		
Gross Fundraising Income		
Annual Giving		# of families x mean gift ($200)
Golf Concessions		last year's gross plus 5%
Magazine Sale		last year's gross
Garage Sale		last year's gross
Other		
Subtotal		
Restricted Capital Income		
Capital Fund		projected goal from families & special gifts
Subtotal		
Total Support and Revenue		

EXPENSES

Line Item	*Amount*	*Assumption*
People-Related		
Salaries		last year's plus COLA plus 1%
Payroll Taxes		total gross salaries x 10% (varies by state
Benefits		count x benefit cost
Professional Development		# of Montessori staff x $400
Faculty Financial Assistance		% of tuition x # of faculty children
Subtotal		
Class-Related		
Books		$500 per classroom
Supplies		consumables: $60 per child
Services		subcontracted services, such as milk
Subtotal		
Administrative		
Postage and Printing		$8 per family
Insurance		varies—see Insurance in Chapter 1
Equipment Maint. & Repair		per service contracts
Audit		per cost of audit
Scholarships		two tuitions per age level
Parent Assoc. Expenses		
Washes		
Misc.		
Subtotal		
Space-Related		
Mortgage		per mortgage
Utilities		increase by 6%-8% annually
Supplies		increase by COLA + sq. footage increase
Building Maintenance		increase by COLA + projected repairs
Property Taxes		per tax
Depreciation		per formula
Subtotal		
Fundraising Expenses		
Annual Giving		last year's expenses + 3%
Golf Concessions		last year's expenses + 3%
Magazine Sale		last year's expenses + 3%
Garage Sale		last year's expenses + 3%
Other		
Subtotal		
Revenues Less Expenses Before Capital Items:		
Capital Items		
Major Repairs		per projection + 20% contingency
New Furniture & Fixtures		per projection + 10% contingency
New Building (Expansion)		per capital drive goal
Vehicles		per projected need
Technology		per projected need
Subtotal		
Capital Items:		
Revenues Less Expenses After Capital Items:		

Figure 5.

level. Usually 65%-75% of expenses are for personnel, and up to another 10-20% are space-related, depending on the extent of the facility.

All budget projections are based on enrollment figures, whether projecting for one year or more. Enrollment projections need to take attrition into account. Established schools can keep a history of attrition to track trends (see Attrition and Retention Analysis in this chapter's Sample Documents), but a new school must rely on a formula; a good estimate is that a school will lose one student for every fifteen currently enrolled.

Assumptions (see Figure 5) tell how the figures in a budget were calculated. For example, if a budget has "payroll taxes" as a line item, the assumption for that line item will give the formula used to calculate payroll taxes. Similarly, a "tuition revenues" assumption tells how many students are anticipated and the amount of tuition per student. Sometimes assumptions appear on the budget itself beside their corresponding line items, but they can also be given in an accompanying budget narrative in paragraph form. Significant changes in the budget from year to year should have detailed assumptions attached.

The Budget Cycle

Budgeting circumstances change. There are at least three major budget revisions. The cycle presented below is based on a commonly used fiscal year of July 1 to June 31, corresponding to the academic year.

Proposed Budget—Head of School and Treasurer (December-January)

The head of school, with the help of the treasurer or business manager, originates the proposed budget for the following year and presents it to the board. The proposed budget should be set up as a comparison to the current year's budget so that the board can easily see what is changing (see Figure 6). Since staff represents nearly 70% of the budget, it is wise to consider the overall budget impact of high, medium, and low salary increases (see Figure 7). Often the medium-level salary increase is the one the head of school is recommending. The usual factor for faculty raises is Cost of Living Allowance (COLA) plus two percent. The current COLA factor can be obtained from the financial section of a newspaper or by calling a local bank. As teachers advance on the salary scale, it is important to acknowledge experience and merit, keeping in mind that experienced teachers may deserve more than COLA plus two percent.

The board reviews the budget and, based on approval of raises and modifications, tuition is set accordingly for the following year (see below). At this point, the head is then able to issue personnel contracts in February.

First Revision—Head and Teachers (June)

By June, personnel changes are handled, and teachers are contracted for the following year. Usually upgrades for the classroom are also turned in by teachers, including material and furniture replacement, and perhaps capital improvements to the room. Also, around this time, the end-of-the-year actuals are in, so the upcoming year's budget should be adjusted with these actuals in mind.

Proposed Budget Compared to Old Budget

	New Budget (Proposed)	Last Year's Budget	% Change
REVENUES			
Operational Income			
Tuition & Fees	$ 324,350	$ 277,160	17%
Other	$ 12,335	$ 10,250	20%
Subtotal	$ 336,685	$ 287,410	17%
Fundraising Income			
Annual Giving	$ 20,000	$ 19,000	5%
Fundraisers	$ 9,500	$ 8,947	6%
Subtotal	$ 29,500	$ 27,947	6%
Restricted Capital Income			
Capital Fund	$ 35,000	$ 30,000	17%
Subtotal	$ 35,000	$ 30,000	17%
Total Support and Revenues:	**$ 401,185**	**$ 345,357**	**16%**
EXPENSES			
People-Related	$ 238,997	$ 202,851	18%
Class-Related	$ 28,867	$ 27,494	5%
Administrative	$ 8,800	$ 7,963	11%
Space-Related	$ 46,350	$ 41,103	13%
Total Expenses:	**$ 323,014**	**$ 279,411**	**16%**
Revenues Less Expenses Before Capital Items:	**$ 78,171**	**$ 65,946**	**19%**
Capital Items	$ 35,823	$ 28,775	24%
Revenues Less Expenses After Capital Items:	**$ 42,348**	**$ 37,171**	**14%**

Figure 6.

Final Budget—Head (October)

With the final enrollment confirmed for the current year, and with a sense of capital needs for the year established, a final budget can be approved. All changes for the current year beyond October can be incorporated into the budget assumptions in presentations of the monthly budget report.

Multiple-Year Budget Projections

A new school, or a school anticipating rapid expansion, may wish to do budget projections for three to five years. These projections are helpful in looking at space needs, faculty needs, capital expenses, fundraising, and marketing needs, even in advance of a long-range plan. While an annual budget aims for accuracy, it is unrealistic to expect that a three- to five-year projection will be cast in stone. Projections must be revised each year in light of the actual revenues and expenses for the current year.

Salary Increase Options

	Current Year	Next Year no increase just new staff	Next Year 5% increase	Next Year 7% increase	Next Year 10% increase
People-Related					
Salaries	$ 261,100.00	$ 279,000.00	$ 292,950.00	$ 298,530.00	$ 306,900.00
Payroll Taxes	$ 19,600.00	$ 23,715.00	$ 24,900.75	$ 25,375.05	$ 26,086.50
Benefits	$ 26,100.00	$ 30,690.00	$ 32,224.50	$ 32,838.30	$ 33,759.00
	$ 306,800.00	**$ 333,405.00**	**$ 350,075.25**	**$ 356,743.35**	**$ 366,745.50**
Class-Related					
Books	$ 2,000.00	$ 2,060.00	$ 2,060.00	$ 2,060.00	$ 2,060.00
Supplies	$ 9,000.00	$ 10,500.00	$ 10,500.00	$ 10,500.00	$ 10,500.00
Services	$ 1,000.00	$ 1,030.00	$ 1,030.00	$ 1,030.00	$ 1,030.00
	$ 12,000.00	**$ 13,590.00**	**$ 13,590.00**	**$ 13,590.00**	**$ 13,590.00**
Administrative					
Office Expenses	$ 4,500.00	$ 4,635.00	$ 4,635.00	$ 4,635.00	$ 4,635.00
Insurance	$ 4,000.00	$ 6,180.00	$ 6,180.00	$ 6,180.00	$ 6,180.00
Misc.	$ 3,000.00	$ 3,300.00	$ 3,300.00	$ 3,300.00	$ 3,300.00
	$ 11,500.00	**$ 14,115.00**	**$ 14,115.00**	**$ 14,115.00**	**$ 14,115.00**
Space-Related					
Mortgage	$ 20,000.00	$ 20,000.00	$ 20,000.00	$ 20,000.00	$ 20,000.00
Utilities	$ 30,000.00	$ 31,800.00	$ 31,800.00	$ 31,800.00	$ 31,800.00
Maintenance	$ 25,000.00	$ 25,750.00	$ 25,750.00	$ 25,750.00	$ 25,750.00
Depreciation	$ 14,000.00	$ 16,500.00	$ 16,500.00	$ 16,500.00	$ 16,500.00
	$ 89,000.00	**$ 94,050.00**	**$ 94,050.00**	**$ 94,050.00**	**$ 94,050.00**
GRAND TOTAL	**$ 419,300.00**	**$ 455,160.00**	**$ 471,830.25**	**$ 478,498.35**	**$ 488,500.50**

Assumptions:

Payroll taxes are currently at 7.5%; they increase to 8.5% next year.
Benefits currently calculated at 10% of salary; increase to 11% next year.
All other expenses have been increased by an inflation factor.

Figure 7.

See Chapters 13-15 for information on fundraising, capital campaigns, and long-range planning.

New schools in particular need a multi-year projection to establish fundraising needs. Any new Montessori school has extensive start-up costs ($30,000 per classroom for furniture and materials) that are seldom covered by tuition alone. Such a school must use enrollment projections to determine anticipated tuition revenue as well as space and personnel costs. The resulting multi-year start-up budget can be used for fundraising, which is targeted at offsetting the capital costs. The three-year start-up budget projections and fundraising strategy of a Montessori charter school, shown in the Sample Documents for this chapter, demonstrate this process in detail.

Setting Tuition

Setting tuition is a key decision for every school. Tuition for Montessori schools is generally about 60% to 70% of the tuition charged by nearby preparatory schools. This has some distinct advantages in attracting a broader market, but it is important to realize that teachers' salaries and percentage wage increases are directly proportional to tuition increases. Based on family demographics and demand for the school, tuition increases can be maximized or minimized.

The Case for Moderate Tuition

Montessori schools have traditionally avoided prep-school levels of tuition. This has kept them focused on their essential academic program, doing what Montessori schools do best: Montessori education. Administrative staff, fancy buildings, gyms, and specialty teachers have generally been kept to a minimum. Moderate tuition has the following advantages:

- It attracts a variety of families and builds a middle-class enrollment that is geared to Montessori education, not necessarily to status.
- It is a hedge against inflation and recession, making it possible to raise tuition without causing too much enrollment drop-off.
- It can serve to protect the school's capital reserve. When an unexpected capital expense occurs (new boiler, new roof, unexpected repair, etc.), moderate tuition levels can be raised incrementally to meet the sudden need without threatening enrollment. This allows the capital reserve to remain invested or to be used for positive purposes such as expansion.
- When families perceive their tuition as affordable, they may be more willing to give to an annual or capital fund drive.

The Case for Higher Tuition

The contemporary market, on the other hand, is not necessarily looking for inexpensive experimental schools but for comprehensive educational alternatives that extend through high school, providing for all facets of development, both curricular and extracurricular. Higher tuition has the following advantages:

- It reduces tiresome and distracting fundraising. Many families would rather pay higher tuition than be "hit up" several times a year.
- Ideally, it means higher teacher salaries. (Some would contend, however, that higher tuition increases demand for more responsive administrative services, causing the additional administrative overhead to eat up the extra tuition money.)
- It makes scholarships possible for families that cannot afford the full fees.
- It stimulates program growth and makes more resources available.

Tuition Decision-Making

One way to determine an appropriate tuition range is to make a study of what other comparable Montessori schools and other independent schools in the region are charging. Usually business managers at other local Montessori schools are happy to provide their tuition scales and percentage increases when asked, especially if you offer to share the results of your study with them. Compiling the collected information into a chart allows you to see local trends (see Figure 8). This same regional research can be done to compare salary scales and percentage increases.

Northeast Ohio Tuition Comparison (1998-99)

Note: Tuitions in Ohio are slightly lower than the national average due to state subsidy.

Infant-Toddler			
BAMA	$	902	2 mornings/wk
BAMA	$	1,342	3 mornings/wk
Horizon	$	2,800	9-month year
Preschool (3-6), half day			
BAMA	$	2,782	12 months
Hershey	$	2,800	
Horizon	$	2,800	9 months
Hudson	$	3,650	
Ruffing East	$	3,660	
Ruffing West	$	3,150	
South Suburban	$	3,190	
Extended Day (additional)			
BAMA	$	475	12 months
Hershey	$	900	
Horizon	$	1,150	9 months
Hudson	$	850	
Ruffing East	$	1,170	
Ruffing West	$	500	
South Suburban	$	1,000	
Lower Elementary (6-9)			
Hershey	$	4,050	
Hudson	$	4,750	
Ruffing East	$	4,910	
Ruffing West	$	4,185	
South Suburban	$	4,290	
Upper Elementary (9-12)			
Hershey	$	4,200	
Hudson	$	4,750	
Ruffing East	$	5,120	
Ruffing West	$	4,185	
South Suburban	$	4,290	
Adolescent (12-14)			
Hershey	$	4,250	
Ruffing East	$	6,120	
Ruffing West	$	4,185	

Figure 8.

Because salaries are often locked into tuition levels, percentage tuition increases usually must fall in the range of 5-6% (COLA plus about 2%; see salaries, below). A salary survey conducted by NAMTA for the 1996-97 school year indicates that Montessori salaries are falling behind salaries at independent private schools.[1] This means that the national median percentage increase in tuition for Montessori schools, which the survey shows has leveled out at about 4%, may not be sufficient to keep Montessori salaries competitive.

Tuition increases and teacher salary increases are a board decision. If the head of school is going to recommend a rather large tuition/salary increase, he or she should meet with the board president and treasurer prior to the full board meeting to make sure the recommendation is in a range the board will find acceptable. Data from national salary surveys such as NAMTA's, as well as the regional research mentioned above, will help the head convince the board that the increases are reasonable and necessary.

Scholarships

Scholarships have both moral and strategic value for the school. Most Montessori schools provide scholarships on the basis of documented need. A minimum scholarship program entails at least one scholarship per age level in the school. More often than not, schools designate an amount from their operations for scholarships, treating them as an annual expense. Other schools, which wish to ensure racial and economic diversity, will actively fundraise for scholarships each year. Mature schools can dedicate an endowment for scholarship funds. Foundations that might not otherwise support a private school are sometimes open to funding scholarships.

See Chapter 7 for specifics on the scholarship or financial aid application and disbursement process.

New-Family Fees, Security Deposits, and Loans

Various fees can be charged when a family enrolls in the school for the first time. These front-end fees establish the parents' commitment to the school and their willingness to be accountable for staying with the school.

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[1] "The 1996-97 NAMTA Salary Survey." *Montessori Theory into Practice* March 1997: 1-9.

New Family Fee

Upon confirming a placement for a child, a family may be asked to pay a one-time non-refundable charge, usually in the range of about $200 to $500, in addition to any tuition deposit required to hold the child's place. When subsequent children from the same family enroll, the family does not have to pay the new-family fee again. Funds from new-family fees are considered general operating revenues. Schools that charge a new-family fee usually do not charge a security deposit or ask parents to make a loan to the school.

Security Deposit

A security deposit is a sum of money (about $200) that is paid for each enrolling child and refunded at the end of a three-year enrollment cycle. In paying the deposit, parents sign an agreement to either keep the child in the school for the entire three-year cycle or forfeit the deposit. Security deposits are placed in a restricted account and can only be used for refunds to parents whose children complete the required cycle. Forfeited security deposits are transferred to the general fund.

Parent Loans

At the time of enrollment, families are sometimes asked to lend money to the school (ranging from $500 to $1000), providing the school with interest-free working capital for the duration of their stay in the school. Most schools refund the loan whenever the family leaves the school.

The practice of parent loans is subject to certain pitfalls because funds from the loans are sometimes incorporated into the operations of the school, and it is tempting to use them to make up annual shortfalls. Problems can emerge if parents, especially those who sit on the board and have access to the school's books, perceive that the school may not be able to refund their loan at the appropriate time. A line of credit, whereby a bank issues credit to the school on the basis of school property or collateral from board members, provides a cleaner accountability around a loan, without involving school families.

Tuition Collection and Enrollment Contracts

Since tuition constitutes the main source of revenue for a school, the schedule of payments needs to be clearly understood, fully published, and contracted with families. Schools can print the tuition payment schedules on their enrollment or re-enrollment contract or publish them in a separate form. The advantage of publishing tuition schedules separately from the enrollment contracts is that they can be used for both the contracts and the school brochure.

The enrollment or re-enrollment contract is a matter of taste and therefore a variety of formats are included with this chapter's Sample Documents. Here is a list of what the contract usually includes:

- Full list of siblings in school

- Statement of parent work and fundraising obligations to the school
- Tuition and fee schedule, including when payments are due and installment options
- Statement of pro-ration of tuition in the case of early withdrawal
- Tuition insurance, if required
- Statement that the advance deposit due with the contract is non-refundable
- Late payment penalties
- Termination of contract

Most schools offer several options for payment: one payment due in August; or two payments, one in August and the other in January; or monthly payments. Monthly payments penalize the school in terms of cash on hand and should have a finance fee (typically 1.5% monthly interest or a flat rate) unless the family applies for installments on a hardship basis. In the latter case, finance fees could be paid by the scholarship fund. The monthly installment plan should be scheduled so that half the year's fees are paid by November and the other half by April in order to provide some leverage in case of delinquent tuition. Some schools prefer to make this ratio 60%-40% so as to have even more leverage. The most efficient collections leverage is exclusion of the child in the event of failure to pay, except in the case of unexpected hardship, which is negotiated with the head of school and/or the board of trustees. Policies that exclude students or withhold records due to delinquent tuition payments should be published in the parent handbook, brochure, or catalog.

Installment payments are usually guaranteed by a promissory note or tuition contract (see document samples) and usually carry tuition insurance (see below). Some schools use a more friendly letter of agreement in lieu of a formal tuition contract. In this case, actual contracts are used only with those families that have a history of late payments.

Tuition refunds are sometimes governed by law. Local regulations should be checked before formulating a refund policy. The policy, along with a statement of which fees are non-refundable, should appear in the enrollment contract; some schools also print it in the school brochure or parent handbook. Some schools base pro-rated refunds on the number of days attended, while others refund by semester. Still other schools require tuition insurance so that they do not lose revenue by making refunds.

Tuition insurance guarantees that full tuition payment is made in the event that a student leaves the school due to illness, dismissal, relocation, etc. The premium, usually modest, is paid by the family. The school's insurance broker can provide information about tuition insurance plans.

Most schools require a 10% non-refundable tuition deposit that accompanies the enrollment or re-enrollment contract, usually due in March prior to the following academic year.

Recommended "Competitive" Starting Salary Ranges Projected for Six Years

Based on NAMTA salary survey for 1996-1997 school year

	1996-97 Range	1997-98 Range	1998-99 Range	1999-00 Range	2000-01 Range	2001-02 Range	2002-03 Range
Infant-Toddler (0-3)							
Newly trained	$18,000 - $23,999	$18,720 - $24,959	$19,469 - $25,957	$20,248 - $26,996	$21,057 - $28,075	$21,900 - $29,198	$22,776 - $30,366
1-5 yrs. experience	$24,000 - $29,999	$24,960 - $31,199	$25,958 - $32,447	$26,997 - $33,745	$28,077 - $35,095	$29,200 - $36,498	$30,368 - $37,958
6-10 yrs. experience	$27,000 - $32,999	$28,080 - $34,319	$29,203 - $35,692	$30,371 - $37,119	$31,586 - $38,604	$32,850 - $40,148	$34,164 - $41,754
Over 10 yrs. experience	$30,000 - $41,999	$31,200 - $43,679	$32,448 - $45,426	$33,746 - $47,243	$35,096 - $49,133	$36,500 - $51,098	$37,960 - $53,142
Preschool (3-6)							
Newly trained	$21,000 - $26,999	$21,840 - $28,079	$22,714 - $29,202	$23,622 - $30,370	$24,567 - $31,585	$25,550 - $32,848	$26,572 - $34,162
1-5 yrs. experience	$24,000 - $29,999	$24,960 - $31,199	$25,958 - $32,447	$26,997 - $33,745	$28,077 - $35,095	$29,200 - $36,498	$30,368 - $37,958
6-10 yrs. experience	$27,000 - $32,999	$28,080 - $34,319	$29,203 - $35,692	$30,371 - $37,119	$31,586 - $38,604	$32,850 - $40,148	$34,164 - $41,754
Over 10 yrs. experience	$30,000 - $44,999	$31,200 - $46,799	$32,448 - $48,671	$33,746 - $50,618	$35,096 - $52,642	$36,500 - $54,748	$37,960 - $56,938
Lower Elementary (6-9)							
Newly trained	$21,000 - $26,999	$21,840 - $28,079	$22,714 - $29,202	$23,622 - $30,370	$24,567 - $31,585	$25,550 - $32,848	$26,572 - $34,162
1-5 yrs. experience	$27,000 - $32,999	$28,080 - $34,319	$29,203 - $35,692	$30,371 - $37,119	$31,586 - $38,604	$32,850 - $40,148	$34,164 - $41,754
6-10 yrs. experience	$30,000 - $35,999	$31,200 - $37,439	$32,448 - $38,937	$33,746 - $40,494	$35,096 - $42,114	$36,500 - $43,798	$37,960 - $45,550
Over 10 yrs. experience	$33,000 - $44,999	$34,320 - $46,799	$35,693 - $48,671	$37,121 - $50,618	$38,605 - $52,642	$40,150 - $54,748	$41,756 - $56,938
Upper Elementary (9-12)							
Newly trained	$24,000 - $29,999	$24,960 - $31,199	$25,958 - $32,447	$26,997 - $33,745	$28,077 - $35,096	$29,200 - $36,498	$30,368 - $37,958
1-5 yrs. experience	$27,000 - $32,999	$28,080 - $34,319	$29,203 - $35,692	$30,371 - $37,119	$31,586 - $38,604	$32,850 - $40,148	$34,164 - $41,754
6-10 yrs. experience	$30,000 - $35,999	$31,200 - $37,439	$32,448 - $38,937	$33,746 - $40,494	$35,096 - $42,114	$36,500 - $43,798	$37,960 - $45,550
Over 10 yrs. experience	$33,000 - $44,999	$34,320 - $46,790	$35,693 - $48,671	$37,121 - $50,618	$38,605 - $52,642	$40,150 - $54,748	$41,756 - $56,938
Adolescent (12-14)							
Newly trained	$24,000 - $32,999	$24,960 - $34,319	$25,958 - $35,692	$26,997 - $37,119	$28,077 - $38,604	$29,200 - $40,148	$30,368 - $41,754
1-5 yrs. experience	$27,000 - $35,999	$28,080 - $37,439	$29,203 - $38,937	$30,371 - $40,494	$31,586 - $42,114	$32,850 - $43,798	$34,164 - $45,550
6-10 yrs. experience	$30,000 - $38,999	$31,200 - $40,559	$32,448 - $42,181	$33,746 - $43,869	$35,096 - $45,623	$36,500 - $47,448	$37,960 - $49,346
Over 10 yrs. experience	$33,000 - $47,999	$34,320 - $49,919	$35,693 - $51,916	$37,121 - $53,992	$38,605 - $56,152	$40,150 - $58,398	$41,756 - $60,734

Figure 9.

Teacher and Administrator Salaries

As mentioned earlier, tuition and salary increases are highly correlated. As with tuitions, it is possible to compare percentage increases in teacher salaries among Montessori and other private schools in the region (although actual salaries may not be made public, usually schools are willing to share the percentage increase). The current Cost of Living Allowance (COLA) provides a guideline for percentage increases. It is customary to add at least 2% to the COLA, resulting in a 5%-6% increase.

NAMTA's 1996-97 salary survey indicated steadily rising tuition increases (up from a median of 2% in 1991-92 to a median of 4% in 1994-95 and 1995-96). Salary increases, as expected, were commensurate with the tuition increases. In comparison to statistics of the National Association of Independent Schools (NAIS), Montessori starting salaries were lagging behind starting salaries at other independent schools, creating a risk that talented starting teachers could be lured away from Montessori. NAMTA therefore recommended that starting Montessori salaries be geared to the upper 15% of reported salaries. Even new schools need to consider higher teacher salaries in order to attract and retain the very best teachers.

Figure 9 shows what were identified as "competitive" starting salary ranges in the 1996-97 salary survey, with projections based on a 4% per annum compounded inflation rate. To project for future years, continue to add 4% per year, compounded.

Despite the reported discrepancies among age levels reported above, many schools are beginning to pay all teachers with the same experience the same salary, regardless of age level taught. A consensus is building that this practice improves teacher morale at all age levels. Equal salaries for faculty at all age levels does not necessarily preclude charging higher tuition for higher age levels. Upper elementary and adolescent programs may require more resources and specialty teachers than required for the younger programs, and therefore the added tuition may be justified.

According to the 1996-97 salary survey, teacher base salary levels are typically raised by about 5% to 8% for advanced degrees (master's or doctorate) attained during employment. Other factors that might affect base salary are more than one Montessori diploma, years of experience in other than Montessori schools, consultant training, or state teacher certification. Merit raises are also an option (see Salary Scales and Salary Advancement, below).

Administrators' salaries reported on the 1996-97 survey were proportional to the size of the school, as shown in Figure 10.

Salary Scales and Salary Advancement

Salary scales establish salary levels for both hiring and advancement in the school. They can help correct uneven compensation habits, which sometimes result from paying disproportionately high salaries to incoming teachers in comparison with senior teachers in an effort to compete in a tight teacher market. Having a salary scale can also prevent uneven raises, fairness issues, and confusion over personnel costs when projecting a budget. Usually when a school evolves a salary scale, it must build its "step" raises around existing salaries, while making adjustments for past inequalities.

Salary scales are like budgets: They represent general guidelines and should be instituted with some discretionary options, especially when hiring a very experienced teacher. This means that the head of school needs the flexibility to determine what constitutes exceptional experience or a unique educational background that might affect the base salary.

If the school uses salary scales for teachers, it should also use them for classroom assistants. Assistant salaries vary greatly by geographic region and age of school. Nevertheless, a qualified assistant with teaching certification or Montessori training should be paid approximately two-thirds the salary of a teacher.

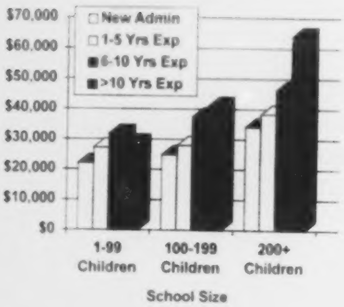


Figure 10.

Salary scales can be increased by "steps." When hiring a teacher with experience or when introducing a salary scale to a school for the first time, the "steps" will not necessarily correspond to actual years of experience or employment. Each step should represent an increase of 2% to 4%. Ideally, the entire scale is increased by an inflation factor (such as COLA) each year, and each teacher advances one step on the scale. In order to be able to afford senior faculty, some scales make the percentage of difference between steps smaller as the steps go up. Other scales allow for equal step raises for experienced teachers with no cap so that longevity with the school is not penalized (see salary scales in this chapter's Sample Documents).

Merit raises can be used in lieu of or in addition to a salary scale. Although merit raises are difficult to calibrate, one way is to have each teacher submit a portfolio including documented curriculum improvement, professional development, and time spent on the premises. It is not recommended that merit raises be attached to test scores because this approach gives test scores an undue emphasis, running counter to more significant Montessori factors such as the psychological well-being of a child, concentration, and cooperation.

Independent School Management, Inc., offers publications and consulting services on all aspects of school management. See Appendix 4, Resources.

Frequently Asked Questions

Who formulates a budget? Is it the head of school, the board, or the finance committee?

First and foremost, the head of school must devise the budget, for the head is the only one with an overview of the whole budget picture and related priorities. The finance committee is made up of the treasurer and other board members who are experienced in finance, assigned to the committee to assure the financial well-being of the school. The finance committee approves the head's budget before it is presented to the full board for discussion and approval.

Does our school need a business manager? How is the business manager's role different from the treasurer's?

The treasurer has overall fiscal responsibility for the school and should be familiar with all of its financial operations but usually is not expected to do the school's bookkeeping and other related duties. Small schools usually hire a bookkeeper, either full- or part-time, but larger schools may need more than a bookkeeper to manage their business operations. These schools may wish to hire a business manager.

A business manager's position usually entails bookkeeping, generating financial reports, paying bills, purchasing, formulating projections and budgets (with the recommendation of the head), maintaining employment paperwork, filing taxes, overseeing the care of building and grounds, etc. The business manager should report to the head and should not convey financial information to anyone except through the head.

Although the treasurer and board president or chair may occasionally wish to talk directly to the business manager, the head of school should first be made aware of what information is being sought. It is important not to bypass the head, which can not only create division and confusion of viewpoints, but can ultimately undermine the head's decision-making autonomy. Likewise, the treasurer should not make decisions or recommendations to the board without full involvement of the head of school.

Most Montessori school heads have pedagogical skills but not necessarily business skills. They depend on a business manager to keep them informed about good financial practices. However, every school head, as mentioned earlier, must know the numbers in order to make sound financial decisions that relate to program needs. Therefore, a business manager should not be an excuse for the head to ignore finances, but rather a tool to keep the head better informed.

When is it acceptable to raise tuition in excess of the usual annual rate that is based on COLA and teacher step raises?

Raising tuition more than 5% or 6% annually always entails risk. It may change the character of the school, limiting enrollment to more wealthy families, or it may eliminate latitude to raise tuition to cover expansion or unexpected emergencies like sudden inflation. Finally, it may exceed regional Montessori tuition norms, making the school uncompetitive. When, then, is a tuition hike of more than 6% justified? Almost never–yet schools do sometimes choose to make drastic hikes for the following reasons:

- The school wants to change teacher or assistant salaries to make them competitive with the market.
- There has been a fundraising shortfall in connection with a capital project (expansion, new building, etc.). In this case, it is possible to raise tuition in order to keep debt service from over-encumbering the school. Be aware, however, that many parents will distrust any large tuition increase on the heels of a capital campaign to which they have contributed.
- The school wishes to eliminate any dependency on fundraising. That means that all fundraising supports capital improvements and is not necessary for operations.

Under what conditions should a school make an offer exceeding the salary scale's entry level salary in order to attract a new teacher?

See Chapter 9 for more information on hiring and the match

Good Montessori elementary and infant-toddler teachers are in short supply, so schools will always be in competition for teachers. However, it should be noted that sensible teachers seldom select a school for salary reasons entirely, and, in fact, it is desirable from the school's standpoint to find a teacher that matches the school's atmosphere and special characteristics. Therefore consider playing up the psychological match before using money as a lure. Salary scales exist, in part, to discipline the head of school from making impulsive decisions in a bidding war for a teacher. The only time to violate the salary scale is when a teacher's extensive experience would provide a sure attraction for the school. No matter how charming or talented a first-year teacher, he or she, generally speaking, should come in at an entry-level salary. There are *rare* beginners–coming from good colleges, with high grade-point averages, with specialty backgrounds in music, art, gym, or second language, and with outstanding experiences with children–who may justify a higher-than-scale entry salary.

When is it acceptable to run a deficit budget and why?

This is all relative to the school's capital reserve or fundraising prospects. A deficit may occur at a transition point, where one class splits into two smaller classes, both of which show less enrollment than capacity but will fill up the following year and generate a surplus which would make up the deficit. This, again, is where a three- or five-year budget projection is helpful.

Starting or expanding schools will always have capital charges for space rehabilitation, Montessori materials, etc., so capital resources need to come from fundraising, lines of credit, etc. Private schools can be eligible for foundation or corporate support if they demonstrate a socially relevant community cause–a model for the public sector, an emphasis on special needs, low tuition or scholarships for less wealthy families, etc.

Sometimes schools discover that there is a special Montessori teacher in the area looking for a job, so they "bank" the teacher–that is, hire a teacher as an assistant for one year until an anticipated opening occurs, let's say, in the following year. Banking a teacher may incur a deficit because the teacher is serving as an assistant while earning more than a standard assistant's salary.

What can a school do to hold down tuition when facing faculty raises and new benefits, capital costs, and expansion all at once?

Options include adding a summer camp, adding after-school programming, obtaining an endowment, annual giving, mechanizing office functions, more large fundraisers including auctions, paydown of the mortgage through a special fund drive, or actually deferring the expansion. If added programming is being considered, carefully weigh wear and tear on the building, furniture, and fixtures, as well as increased utilities, in order to get a sense of the true net gain.

Further Reading from NAMTA

The following articles and documents are available as photocopies from NAMTA. See Appendix 4 for ordering information.

McNamara, John. "Financial Development: Bookkeeping." *The NAMTA Quarterly* 3.1 (1977, Fall): 41-42. 2 total pages.

Sample Documents

The following documents illustrate common practices in Monessori school operations. To view at full size, photocopy and enlarge.

Financial Procedures, Old Brooklyn Montessori School (Cleveland, OH)

E. Fiscal Controls

Contracts. All contracts entered into by OBMS must be in writing and approved by the Board of Trustees after review and recommendation by the Fiscal Agent, the treasurer, and attorney.

Expenditures Under $500.00. The Principal is authorized to make expenditures up to $500.00 without prior review and approval of the Fiscal Agent or the Board of Trustees, provided such funds are available and have been authorized and approved within the existing school budget.

Expenditures of $500.00 and Above. All expenditures exceeding $500.00 MUST be referred to the Board for approval. The Principal, Fiscal Agenct, Treasurer, or any Board Member may refer the matter to the Board.

Separation of Record Keeping and Check Signing Functions. To the maximum extent possible, record keeping (i.e., posting of transactions, bank reconciliations, general ledger input, etc.) and authority to sign and approve checks shall be designated to separate employees to ensure the financial integrity of OBMS.

(a) The School Secretary is the primary record keeper.

(b) The Principal may sign checks provided the second signatory on the check is a key board member.

Check Signing Authority. Two signatures are required on all checks. For expenditures exceeding $500.00, an officer of the Board of Trustees must be one of the signatories.

All Disbursements to be Made by Check. Except as otherwise provided herein, no disbursements shall be made by cash and no check shall be written to "cash." However, the Principal may maintain a nominal petty cash fund not to exceed $25.00 which may be used for small emergency expenditures.

Itemized Receipts Required. Itemized receipts are required as vouchers for all expenditures.

Banking Relationships. Three banking relationships will be established by OBMS at such times as the Board of Trustees believes it is appropriate: (1) Checking Account (2) Savings Account (3) Line of Credit.

Record Keeping Requirements. The primary record keeper (School Secretary) must be bonded.

(1) All revenues, from whatever source, must be recorded daily.

(2) Cash payments should be discouraged.

(3) All financial transactions must be posted daily.

(4) The Fiscal Agent, or Treasurer, will provide the Board of Trustees with financial reports on a monthly basis. More frequent reports may be requested by the Board should circumstances necessitate such action.

Responsibilities Incorporated into Job Descriptions. All responsibilities identified and

When beginning a school, financial procedures should be spelled out in order to ensure standard bookkeeping practices and timely completion of all deposits and payments. (Payroll is not included in these procedures because this school outsources payroll.)

Financial Procedures, Old Brooklyn Montessori School (continued)

delegated above will be incorporated into the job descriptions of the affected position(s), where appropriate.

Cycles of Periodic Events. The following cycles of periodic events shall be maintained to ensure the financial integrity of OBMS:

(a) Daily cycle.

(1) Post all transactions.

(2) Deposit all receipts.

(3) Calculate checking, savings and line of credit balances (where appropriate).

(b) Bi-Weekly cycle.

(1) Treasurer reviews accounts and reports to Board if circumstance require.

(c) Monthly cycle.

(1) Close OBMS books for the month.

(2) Post adjustments and produce the following financial statements:

Bank reconciliation(s).

Post all adjustments to the journal.

Statement of activities (Income Statement), which shall include:

- current revenues and expenses
- year-to-date revenues and expenses
- comparison of year-to-date revenues and expenses with budgeted amounts
- change in net assets

General Ledger.

Statement of Financial Position (Balance Sheet).

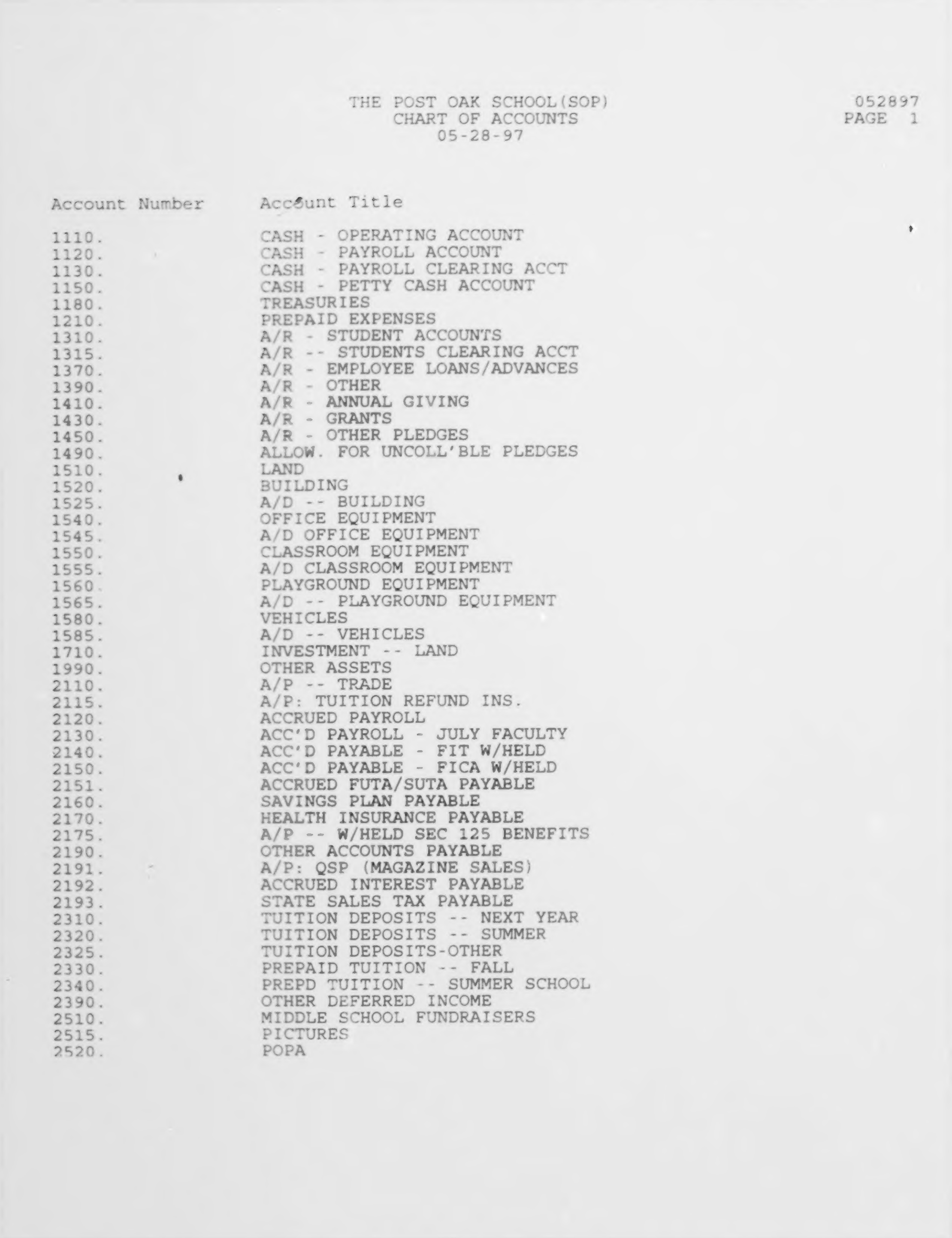
(3) Determine cash needs for the coming month.

(4) Submit financial reports to the OBMS Board of Trustees and provide a comprehensive oral report at the Board meeting. Include any recommendations for changes in the budget.

(d) Annual cycle.

(1) Audit conducted by a Certified Public Accountant, reviewed by the Board of Trustees and a committee of OBMS parents.

Chart of Accounts, The Post Oak School (Bellaire, TX)



THE POST OAK SCHOOL(SOP)
CHART OF ACCOUNTS
05-28-97

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PAGE 1

Account Number	Account Title
1110.	CASH - OPERATING ACCOUNT
1120.	CASH - PAYROLL ACCOUNT
1130.	CASH - PAYROLL CLEARING ACCT
1150.	CASH - PETTY CASH ACCOUNT
1180.	TREASURIES
1210.	PREPAID EXPENSES
1310.	A/R - STUDENT ACCOUNTS
1315.	A/R -- STUDENTS CLEARING ACCT
1370.	A/R - EMPLOYEE LOANS/ADVANCES
1390.	A/R - OTHER
1410.	A/R - ANNUAL GIVING
1430.	A/R - GRANTS
1450.	A/R - OTHER PLEDGES
1490.	ALLOW. FOR UNCOLL'BLE PLEDGES
1510.	LAND
1520.	BUILDING
1525.	A/D -- BUILDING
1540.	OFFICE EQUIPMENT
1545.	A/D OFFICE EQUIPMENT
1550.	CLASSROOM EQUIPMENT
1555.	A/D CLASSROOM EQUIPMENT
1560.	PLAYGROUND EQUIPMENT
1565.	A/D -- PLAYGROUND EQUIPMENT
1580.	VEHICLES
1585.	A/D -- VEHICLES
1710.	INVESTMENT -- LAND
1990.	OTHER ASSETS
2110.	A/P -- TRADE
2115.	A/P: TUITION REFUND INS.
2120.	ACCRUED PAYROLL
2130.	ACC'D PAYROLL - JULY FACULTY
2140.	ACC'D PAYABLE - FIT W/HELD
2150.	ACC'D PAYABLE - FICA W/HELD
2151.	ACCRUED FUTA/SUTA PAYABLE
2160.	SAVINGS PLAN PAYABLE
2170.	HEALTH INSURANCE PAYABLE
2175.	A/P -- W/HELD SEC 125 BENEFITS
2190.	OTHER ACCOUNTS PAYABLE
2191.	A/P: QSP (MAGAZINE SALES)
2192.	ACCRUED INTEREST PAYABLE
2193.	STATE SALES TAX PAYABLE
2310.	TUITION DEPOSITS -- NEXT YEAR
2320.	TUITION DEPOSITS -- SUMMER
2325.	TUITION DEPOSITS-OTHER
2330.	PREPAID TUITION -- FALL
2340.	PREPD TUITION -- SUMMER SCHOOL
2390.	OTHER DEFERRED INCOME
2510.	MIDDLE SCHOOL FUNDRAISERS
2515.	PICTURES
2520.	POPA

A detailed chart of accounts established for a computer bookkeeping system that can compile a variety of reports to suit the needs of the head of school or treasurer.

Chart of Accounts, The Post Oak School (continued)

THE POST OAK SCHOOL(SOP)
CHART OF ACCOUNTS
05-28-97

052897
PAGE 2

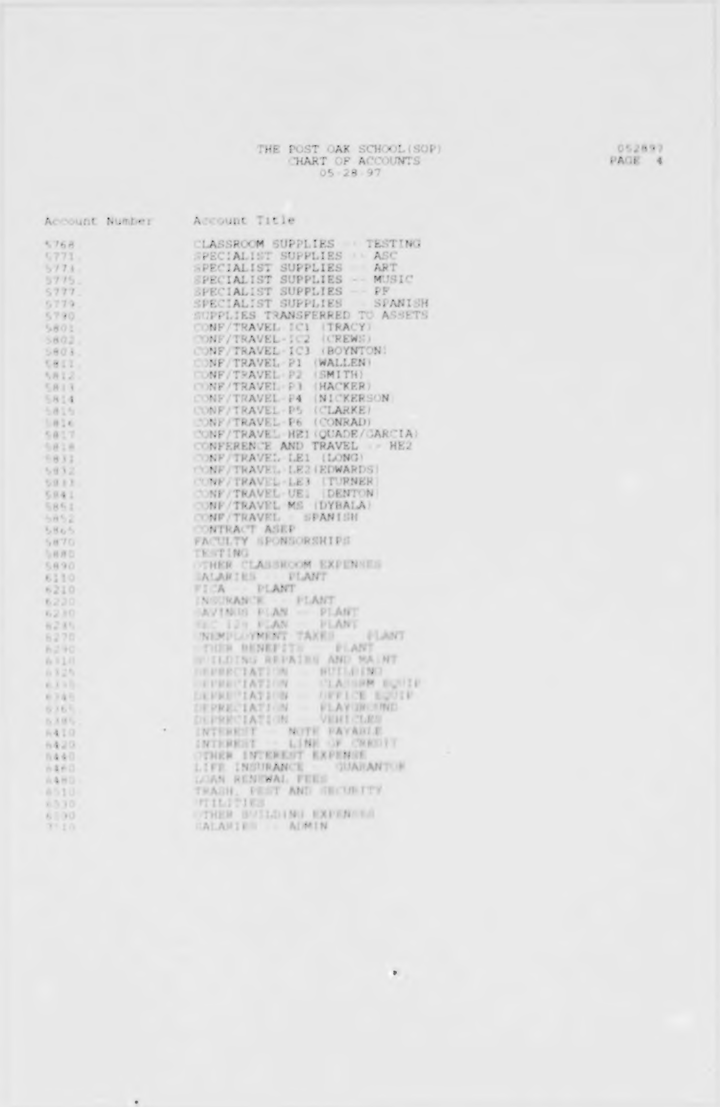
Account Number	Account Title
2530.	SABBATICAL
2531.	STUDENT SUPPL-LE1 (LONG)
2532.	STUDENT SUPPL-LE2 (EDWARDS)
2533.	STUDENT SUPPL-LE3 (TURNER)
2541.	STUDENT SUPPL-UE1 (DENTON)
2551.	STUDENT SUPPL-MS (DYBALA)
2631.	STUDENT TRIPS-LE1 (LONG)
2632.	STUDENT TRIPS-LE2 (EDWARDS)
2633.	STUDENT TRIPS-LE3 (TURNER)
2641.	STUDENT TRIPS-UE1 (DENTON)
2651.	STUDENT TRIPS-MS (DYBALA)
2660.	VISION AND HEARING
2670.	YEARBOOK
2690.	OTHER LIABILITIES
2710.	NOTE PAYABLE -- LONG TERM
2720.	LINE OF CREDIT
2810.	RESERVE FOR CONTINGENCIES
3110.	NET ASSETS -- UNRESTRICTED
3120.	NET ASSETS -- TEMP. RESTRICTED
3150.	RETAINED EARNINGS (DEFICIT)
4110.	TUITION -- REGULAR
4120.	TUITION -- SUMMER SCHOOL
4130.	TUITION -- BEFORE SCHOOL CARE
4140.	TUITION -- AFTER SCHOOL CARE
4150.	TUITION -- ASEP
4190.	TUITION SURCHARGE
4210.	APPLICATION FEES -- REGULAR
4220.	APPLICATION FEES -- SUMMER
4240.	NEW FAMILY FEES
4260.	LATE PICK-UP FEES
4270.	A/R TRANSFER ACCOUNT
4290.	OTHER FEES
4410.	BOOK FAIR INCOME
4415.	BOOK FAIR EXPENSE
4416.	OTHER INCOME-MAGAZINE SALES
4417.	OTHER EXPENSES-MAGAZINE SALES
4418.	OTHER INCOME-GOLD C BOOKS
4419.	OTHER EXPENSES-GOLD C BOOKS
4420.	COOKBOOK INCOME
4425.	COOKBOOK EXPENSE
4430.	CARNIVAL INCOME
4435.	CARNIVAL EXPENSE
4450.	OPERA INCOME
4455.	OPERA EXPENSE
4460.	CINCO DE MAYO INCOME
4465.	CINCO DE MAYO EXPENSE
4470.	WORKSHOP INCOME
4475.	WORKSHOP EXPENSE
4480.	GARAGE SALE INCOME
4485.	GARAGE SALE EXPENSE

THE POST OAK SCHOOL(SOP)
CHART OF ACCOUNTS
05-28-97

052897
PAGE 3

Account Number	Account Title
4490.	OTHER MISC FUNCTIONS INCOME
4495.	OTHER MISC FUNCTIONS-EXPENSE
4610.	CONTRIBUTIONS -- ANNUAL GIVING
4620.	CONTRIBUTIONS -- GRANTS
4630.	CONTRIBUTIONS -- BOOK FAIR
4640.	CONTRIBUTIONS -- CARNIVAL
4660.	CONTRIBUTIONS -- CINCO DE MAYO
4680.	CONTRIBUTIONS -- SABBATICAL
4690.	CONTRIBUTIONS -- OTHER
4710.	INTEREST INCOME -- BANKS
4780.	INTEREST INCOME -- TREASURIES
4910.	RETURNED CHECK FEES
4920.	RETURN ITEM CHARGES
4950.	GAIN/LOSS ON SALE OF ASSETS
4990.	MISCELLANEOUS INCOME
4995.	EVENSTART PROGRAM INCOME
5110.	SALARIES -- FACULTY
5115.	SALARIES -- ASSISTANTS
5120.	SALARIES -- SPECIALISTS
5125.	SALARIES -- ASEP
5135.	SALARIES -- SUMMER
5140.	SALARIES -- SUBSTITUTES
5145.	SALARIES -- LIBRARY
5150.	UNUSED SICK DAY
5210.	FICA -- FACULTY
5220.	INSURANCE -- FACULTY
5230.	SAVINGS PLAN -- FACULTY
5235.	SEC 125 PLAN -- FACULTY
5250.	FACULTY SCHOLARSHIPS
5270.	UNEMPLOYMENT TAXES -- FACULTY
5290.	OTHER BENEFITS -- FACULTY
5701.	CLASSRM SUPPL-IC1 (TRACY)
5702.	CLASSRM SUPPL-IC2 (CREWS)
5703.	CLASSRM SUPPL-IC3 (BOYNTON)
5711.	CLASSRM SUPPL-P1 (WALLEN)
5712.	CLASSRM SUPPL-P2 (SMITH)
5713.	CLASSRM SUPPL-P3 (HACKER)
5714.	CLASSRM SUPPL-P4 (NICKERSON)
5715.	CLASSRM SUPPL-P5 (CLARKE)
5716.	CLASSRM SUPPL-P6 (CONRAD)
5717.	CLASSRM SUPPL-HE(QUADE/GARCIA)
5731.	CLASSRM SUPPL-LE1 (LONG)
5732.	CLASSRM SUPPL-LE2 (EDWARDS)
5733.	CLASSRM SUPPL-LE3 (TURNER)
5741.	CLASSRM SUPPL-UE1 (DENTON)
5751.	CLASSRM SUPPL-MS (DYBALA)
5760.	CLASSROOM SUPPLIES -- ASEP
5762.	CLASSROOM SUPPLIES -- COMMON
5764.	CLASSROOM SUPPLIES -- LIBRARY
5766.	CLASSROOM SUPPLIES -- SUMMER

Chart of Accounts, The Post Oak School (continued)



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                    THE POST OAK SCHOOL(SOP)                 052897
                      CHART OF ACCOUNTS                      PAGE  4
                          05-28-97

Account Number    Account Title

5768.             CLASSROOM SUPPLIES -- TESTING
5771.             SPECIALIST SUPPLIES -- ASC
5773.             SPECIALIST SUPPLIES -- ART
5775.             SPECIALIST SUPPLIES -- MUSIC
5777.             SPECIALIST SUPPLIES -- PE
5779.             SPECIALIST SUPPLIES -- SPANISH
5790.             SUPPLIES TRANSFERRED TO ASSETS
5801.             CONF/TRAVEL-IC1 (TRACY)
5802.             CONF/TRAVEL-IC2 (CREWS)
5803.             CONF/TRAVEL-IC3 (BOYNTON)
5811.             CONF/TRAVEL-P1 (WALLEN)
5812.             CONF/TRAVEL-P2 (SMITH)
5813.             CONF/TRAVEL-P3 (HACKER)
5814.             CONF/TRAVEL-P4 (NICKERSON)
5815.             CONF/TRAVEL-P5 (CLARKE)
5816.             CONF/TRAVEL-P6 (CONRAD)
5817.             CONF/TRAVEL-HE1(QUADE/GARCIA)
5818.             CONFERENCE AND TRAVEL -- HE2
5831.             CONF/TRAVEL-LE1 (LONG)
5832.             CONF/TRAVEL-LE2(EDWARDS)
5833.             CONF/TRAVEL-LE3 (TURNER)
5841.             CONF/TRAVEL-UE1 (DENTON)
5851.             CONF/TRAVEL-MS (DYBALA)
5852.             CONF/TRAVEL -- SPANISH
5865.             CONTRACT ASEP
5870.             FACULTY SPONSORSHIPS
5880.             TESTING
5890.             OTHER CLASSROOM EXPENSES
6110.             SALARIES -- PLANT
6210.             FICA -- PLANT
6220.             INSURANCE -- PLANT
6230.             SAVINGS PLAN -- PLANT
6235.             SEC 125 PLAN -- PLANT
6270.             UNEMPLOYMENT TAXES -- PLANT
6290.             OTHER BENEFITS -- PLANT
6310.             BUILDING REPAIRS AND MAINT
6325.             DEPRECIATION -- BUILDING
6335.             DEPRECIATION -- CLASSRM EQUIP
6345.             DEPRECIATION -- OFFICE EQUIP
6365.             DEPRECIATION -- PLAYGROUND
6385.             DEPRECIATION -- VEHICLES
6410.             INTEREST -- NOTE PAYABLE
6420.             INTEREST -- LINE OF CREDIT
6440.             OTHER INTEREST EXPENSE
6460.             LIFE INSURANCE -- GUARANTOR
6480.             LOAN RENEWAL FEES
6510.             TRASH, PEST AND SECURITY
6530.             UTILITIES
6590.             OTHER BUILDING EXPENSES
7110.             SALARIES -- ADMIN
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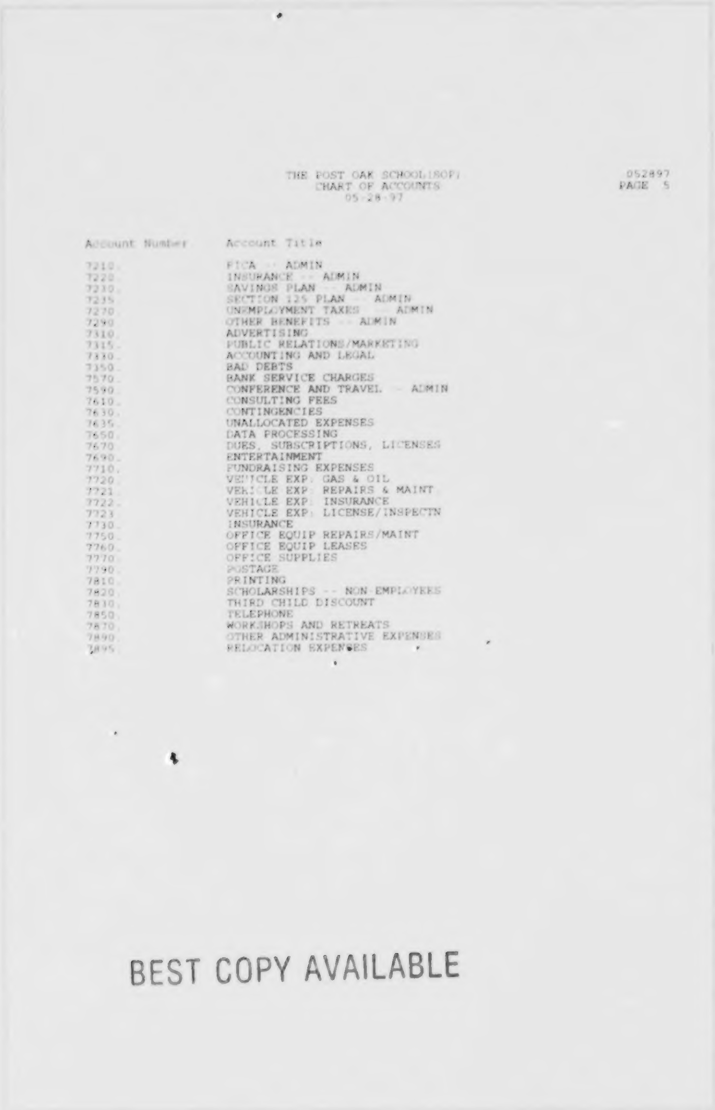

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                    THE POST OAK SCHOOL(SOP)                 052897
                      CHART OF ACCOUNTS                      PAGE  5
                          05-28-97

Account Number    Account Title

7210.             FICA -- ADMIN
7220.             INSURANCE -- ADMIN
7230.             SAVINGS PLAN -- ADMIN
7235.             SECTION 125 PLAN -- ADMIN
7270.             UNEMPLOYMENT TAXES -- ADMIN
7290.             OTHER BENEFITS -- ADMIN
7310.             ADVERTISING
7315.             PUBLIC RELATIONS/MARKETING
7330.             ACCOUNTING AND LEGAL
7350.             BAD DEBTS
7570.             BANK SERVICE CHARGES
7590.             CONFERENCE AND TRAVEL -- ADMIN
7610.             CONSULTING FEES
7630.             CONTINGENCIES
7635.             UNALLOCATED EXPENSES
7650.             DATA PROCESSING
7670.             DUES, SUBSCRIPTIONS, LICENSES
7690.             ENTERTAINMENT
7710.             FUNDRAISING EXPENSES
7720.             VEHICLE EXP: GAS & OIL
7721.             VEHICLE EXP: REPAIRS & MAINT
7722.             VEHICLE EXP: INSURANCE
7723.             VEHICLE EXP: LICENSE/INSPECTN
7730.             INSURANCE
7750.             OFFICE EQUIP REPAIRS/MAINT
7760.             OFFICE EQUIP LEASES
7770.             OFFICE SUPPLIES
7790.             POSTAGE
7810.             PRINTING
7820.             SCHOLARSHIPS -- NON-EMPLOYEES
7830.             THIRD CHILD DISCOUNT
7850.             TELEPHONE
7870.             WORKSHOPS AND RETREATS
7890.             OTHER ADMINISTRATIVE EXPENSES
7895.             RELOCATION EXPENSES
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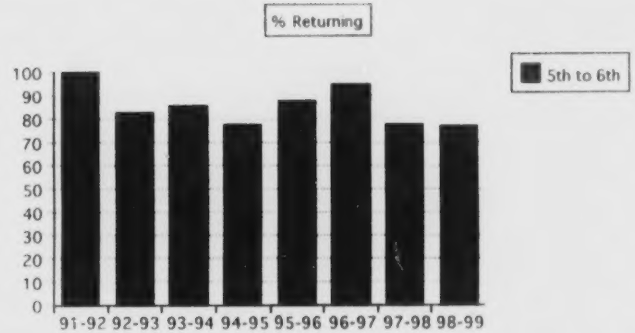
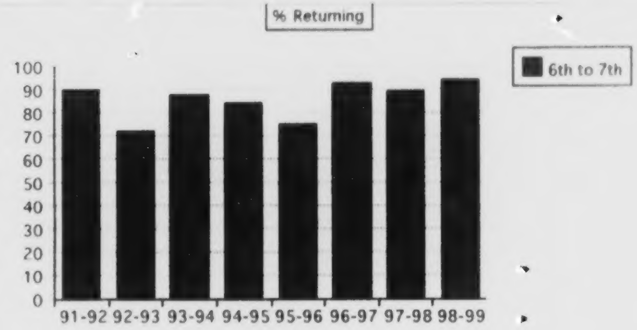
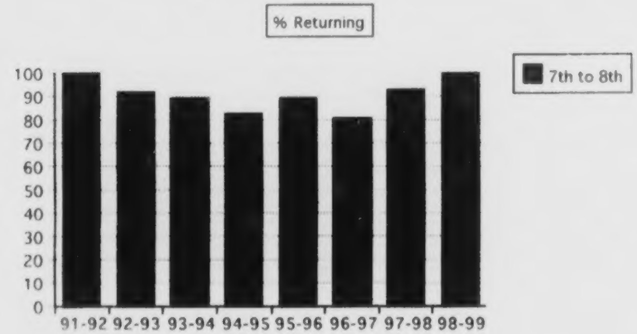






This analysis shows specific areas of attrition, focusing on when families have chosen to withdraw their children over an eight-year period. This type of analysis is very important for large schools that are losing children in order to determine whether there are characteristic dropout places in the school and their probable causes

Attrition-Retention Analysis

Enrollment-attrition=retention by age/grade from Fall 1992 to Fall 1998
E.g., in Fall of 91, 29 enrolled as 3's, in Fall of 92, 24 returned as 4's

	3yr old to 4y	4yr old to 5	5yr to 1st gr	1st to 2nd	2nd to 3rd
1991-92	29-5=24	26-5=21	28-8=20	34-3=31	31-1=30
1992-93	26-1=25	29-3=26	27-7=20	32-3=29	36-6=30
1993-94	26-3=23	26-5=21	32-6=26	33-5=28	33-5=28
1994-95	23-4=19	30-4=26	31-9=22	36-2=34	28-3=25
1995-96	21-4=17	29-5=24	33-9=24	33-6=27	36-5=31
1996-97	26-5=21	23-6=17	32-10=22	33-4=29	28-2=26
1997-98	25-2=23	30-8=22	26-7=19	36-3=33	33-4=29
1998-99	27-3=24	27-4=23	28-6=22	26-1=25	37-5=32

	3rd to 4th	4th to 5th	5th to 6th	6th to 7th	7th to 8th
1991-92	29-3=26	30-2=28	25-0=25	29-3=26	12-0=12
1992-93	28-4=24	27-6=21	30-5=25	25-7=18	24-2=22
1993-94	32-5=27	28-6=22	22-3=19	26-3=23	18-2=16
1994-95	28-6=22	32-0=32	23-5=18	19-3=16	23-4=19
1995-96	25-7=18	22-3=19	33-4=29	20-5=15	18-2=16
1996-97	34-9=25	18-2=16	21-1=20	29-2=27	16-3=13
1997-98	26-7=19	24-1=23	18-4=14	19-2=17	27-2=25
1998-99	26-9=17	23-4=19	22-7=15	16-3=13	15-0=15

Percent retention of those enrolled in Fall of one year to Fall of next year

	3yr old to 4y	4yr old to 5	5yr to 1st gr	1st to 2nd	2nd to 3rd
91-92	83	81	71	91	97
92-93	96	90	74	91	83
93-94	88	81	81	85	85
94-95	83	87	71	94	89
95-96	81	83	73	82	86
96-97	81	74	69	88	93
97-98	92	73	73	92	88
98-99	89	85	79	96	86

	3rd to 4th	4th to 5th	5th to 6th	6th to 7th	7th to 8th
91-92	90	93	100	90	100
92-93	86	78	83	72	92
93-94	84	79	86	88	89
94-95	79	100	78	84	83
95-96	72	86	88	75	89
96-97	74	89	95	93	81
97-98	73	96	78	89	93
98-99	65	83	68	81	100

Three-Year Projected Budget, Old Brooklyn Montessori School (Cleveland, OH)

CHARTER SCHOOL
THREE-YEAR BUDGET (Operations and Capital Budget)

SUMMARY	TOTAL 1998 - 2001	1998 - 1999	1999 - 2000	2000 - 2001
Number of classrooms		1	2	4
Number of students		30	60	105
REVENUES				
State Subsidy @ current formula rates (see page 2)	886,802	127,800	268,058	490,943
Grants	247,350	167,350	80,000	0
Other income (user fees, interest)	33,000	6,000	12,000	15,000
TOTAL REVENUES	1,167,152	301,450	360,058	505,943
EXPENSES	888,242	181,696	288,135	418,411
REVENUES OVER EXPENSES	278,909	119,454	71,924	87,532

Actual Establishment Costs vs. Revenue Surplus (over three years)

Capital Costs	216,500	87,500	43,000	86,000
Material expense for 1999 - 2000 year		31,953	(31,953)	
		119,453	11,047	
REVENUES LESS OPERATING EXPENSES AND CAPITAL COSTS	84,503	1	82,971	1,532

Assumption #1	By the end of the third year, the operating surplus exceeds capital costs by	84,503	Surplus
Assumption #2	In the first year, the operating surplus exceeds capital costs by	1	Surplus
Assumption #3	In the second year, the operating surplus exceeds capital costs by	82,971	Surplus
Assumption #4	In the third year, the operating surplus exceeds capital costs by	1,532	Surplus

Note #2: The school will purchase many of its Montessori materials and complete renovation of a second classroom in the 1998 - 1999 year in preparation for the 1999 - 2000 year.

ENROLLMENT PATTERNS

	GRADE	CLASSROOM 1 (ACTUAL)	CLASSROOM 2	CLASSROOM 3	CLASSROOM 4	
1998 - 1999	1	14				
	2	10				
	3	6				
Total number of students 1998 - 1999	30	30	0	0	0	4260
State subsidy (@ current formula rates) @ $4,260.00	127,800.00					
1999 - 2000	1	0	15			
	2	13	15			
	3	12				
	4	5				
Total number of students 1999 - 2000	60	30	30	0	0	
State subsidy (@ current formula rates) @ $4,467.64	268,058.40					4467.64
2000 - 2001	1	9	9	15		
	2	10	12	15		
	3	11	9			
	4				10	
	5				5	
Total number of students 2000 - 2001	105	30	30	30	15	
State subsidy (@ current formula rates) @ $4,675.65	490,943.25					4675.65
TOTAL STATE SUBSIDY 1998 - 2001	886,801.65					

In this multiple-year budget, enrollment is projected first in order to determine revenues (in this case, a state subsidy because the school is a publicly funded charter school). Then operating and capital costs are projected, based on the projected enrollment. Fundraising is then projected to offset capital costs. A summary sheet shows the bottom line for each year as well as a composite for all three years.

Three-Year Projected Budget, Old Brooklyn Montessori School (continued)

OPERATING EXPENSES	1998 - 1999	1999 - 2000	2000 - 2001	
Payroll				
Salaries - Administrator	12,188	33,475	34,479	Administrator hired for 4.5 months
Salaries - Teacher (administrator part of first year)	37,476	36,050	37,132	Base salary increases 3% per year
Salaries - Teacher #2		35,000	36,050	Base salary increases 3% per year
Salaries - Teacher #3			35,000	
Salaries - Teacher #4			35,000	
Salaries - Class Assistant #1	20,000	20,600	21,218	Base salary increases 3% per year
Salaries - Class Assistant #2		15,000	15,450	Base salary increases 3% per year
Salaries - Class Assistant #3			15,000	
Salaries - Office	11,340	16,179	16,665	Base salary increases 3% per year, increase in FTE
Salaries - Custodial	4,500	6,875	10,622	Base salary increases 3% per year, increase in FTE
Salaries - Substitutes	3,000	3,090	3,183	
Payroll taxes	16,520	30,126	46,550	
Benefits	2,800	9,600	17,641	
Professional development	2,000	2,000	2,000	
Subtotal - Payroll & professional development	109,823	207,996	325,989	
Classroom	1 classroom	2 classrooms	4 classrooms	
Materials	1,000	2,060	4,244	
Books	1,000	2,060	4,244	
Program enrichment	2,000	3,000	4,000	
Supplies	1,000	2,060	4,244	
Start-up supplies	1,000	1,000	2,060	
Miscellaneous	1,000	2,060	4,244	
Subtotal - Classroom	7,000	12,240	23,034	

Operating Expenses continued on page 4

OPERATING EXPENSES (continued)	1998 - 1999	1999 - 2000	2000 - 2001
Administrative			
Postage	1,000	1,030	1,061
Printing	1,000	1,030	1,061
Supplies	1,000	1,030	1,061
Insurance	10,000	10,300	10,609
Equipment	3,000	3,090	3,183
Accounting/Audit; Grant Writing	12,000	12,360	12,731
Debt: Interest charges	7,000	7,800	6,125
Miscellaneous	5,000	6,090	7,183
Subtotal - Administrative	40,000	42,730	43,013
Institutional			
Rent [1st 2 years set; then increases by CPI (3% per yr)]	15,000	15,000	15,900
Utilities ($6,000 set 1st year plus separate metering for 2nd floor)	8,000	8,240	8,487
Maintenance	1873	1,929	1,987
Subtotal - Institutional	24,873	25,169	26,374
Total: operating expenses	181,696	288,135	418,411

Three-Year Projected Budget, Old Brooklyn Montessori School (continued)

CHARTER SCHOOL
CAPITAL COSTS

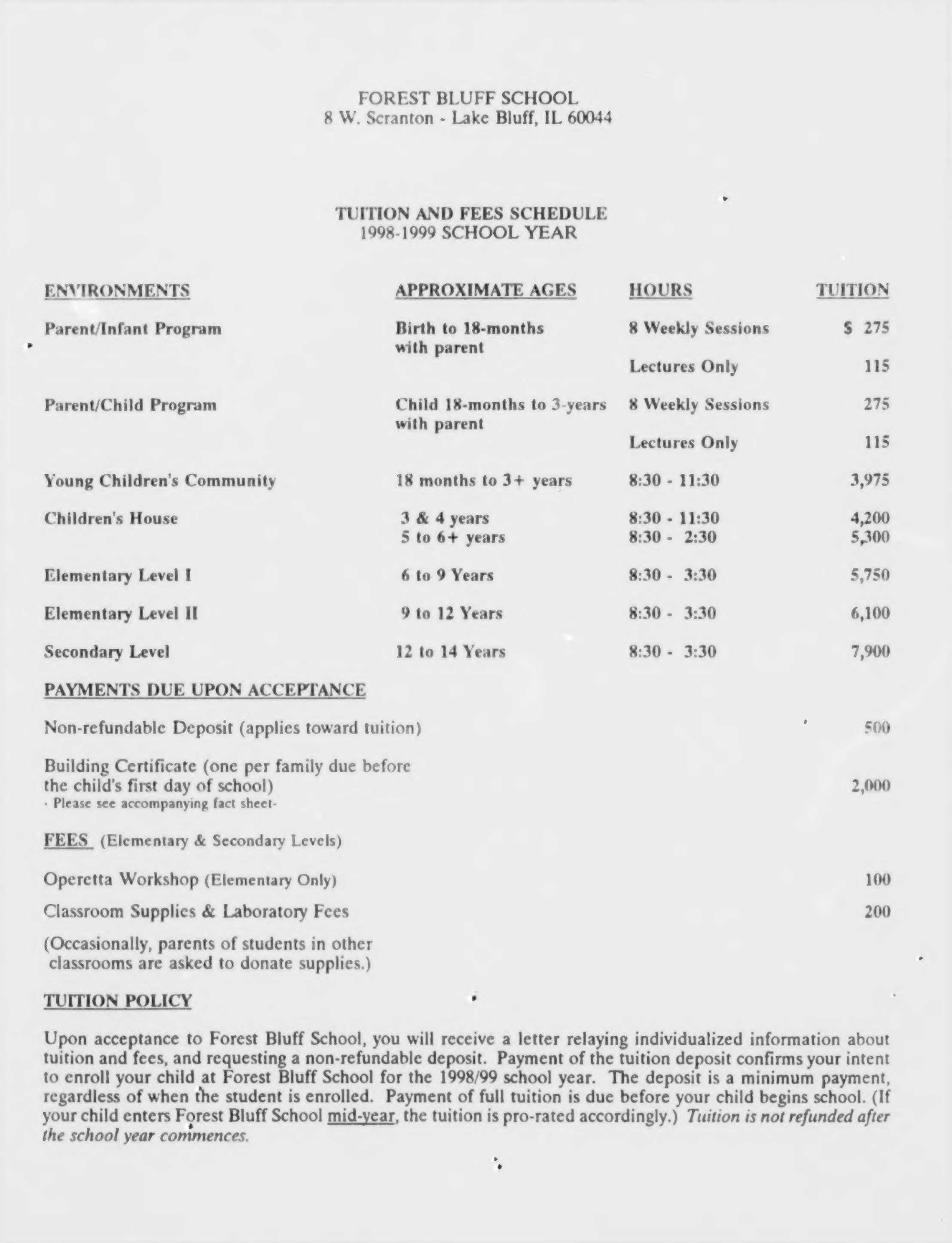
	1998 - 1999	1999 - 2000	2000 - 2001	
Number of new classrooms (per year)	1	1	2	TOTAL
Montessori apparatus	31,000.00	25,000.00	50,000.00	106,000.00
Practical life supplies	1,000.00	1,000.00	2,000.00	4,000.00
Classroom books	1,000.00	1,000.00	2,000.00	4,000.00
Classroom furniture	2,500.00	6,000.00	12,000.00	20,500.00
Office furniture and equipment	3,000.00	0.00	0.00	3,000.00
Office computers & electronics	4,000.00	0.00	0.00	4,000.00
Licensing & fees	500.00	0.00	0.00	500.00
Indoor/outdoor recreation	3,000.00	0.00	0.00	3,000.00
Building renovation to code/classroom renov.	41,500.00	10,000.00	20,000.00	71,500.00
TOTAL START UP CAPITAL REQUIRED	**$87,500.00**	**$43,000.00**	**$86,000.00**	**$216,500.00**

CHARTER SCHOOL

Schedule of Fundraising (1998 - 1999)
(as of February 4, 1999)

Received	
Foundation A	25,000
Private Gift	500
Private Gift	1,850
Foundation B	32,000
Foundation C	20,000
Subtotal: received as of 2/4/99	79,350
Targeted	
Foundation D	35,000
Foundation E	8,000
Foundation F	25,000
Foundation G	20,000
Subtotal: Targeted	88,000
Total 1998 - 1999	167,350
Liberal estimate of additional fundraising	
Personal Gifts	50,000
Foundation H	5,000
	55,000

Tuition and Fees Schedule, Forest Bluff School (Lake Bluff, IL)



FOREST BLUFF SCHOOL
8 W. Scranton - Lake Bluff, IL 60044

TUITION AND FEES SCHEDULE
1998-1999 SCHOOL YEAR

ENVIRONMENTS	APPROXIMATE AGES	HOURS	TUITION
Parent/Infant Program	**Birth to 18-months with parent**	**8 Weekly Sessions**	**$ 275**
		Lectures Only	**115**
Parent/Child Program	**Child 18-months to 3-years with parent**	**8 Weekly Sessions**	**275**
		Lectures Only	**115**
Young Children's Community	**18 months to 3+ years**	**8:30 - 11:30**	**3,975**
Children's House	**3 & 4 years**	**8:30 - 11:30**	**4,200**
	5 to 6+ years	**8:30 - 2:30**	**5,300**
Elementary Level I	**6 to 9 Years**	**8:30 - 3:30**	**5,750**
Elementary Level II	**9 to 12 Years**	**8:30 - 3:30**	**6,100**
Secondary Level	**12 to 14 Years**	**8:30 - 3:30**	**7,900**

PAYMENTS DUE UPON ACCEPTANCE

Non-refundable Deposit (applies toward tuition)	500
Building Certificate (one per family due before the child's first day of school) - Please see accompanying fact sheet-	2,000

FEES (Elementary & Secondary Levels)

Operetta Workshop (Elementary Only)	100
Classroom Supplies & Laboratory Fees	200

(Occasionally, parents of students in other classrooms are asked to donate supplies.)

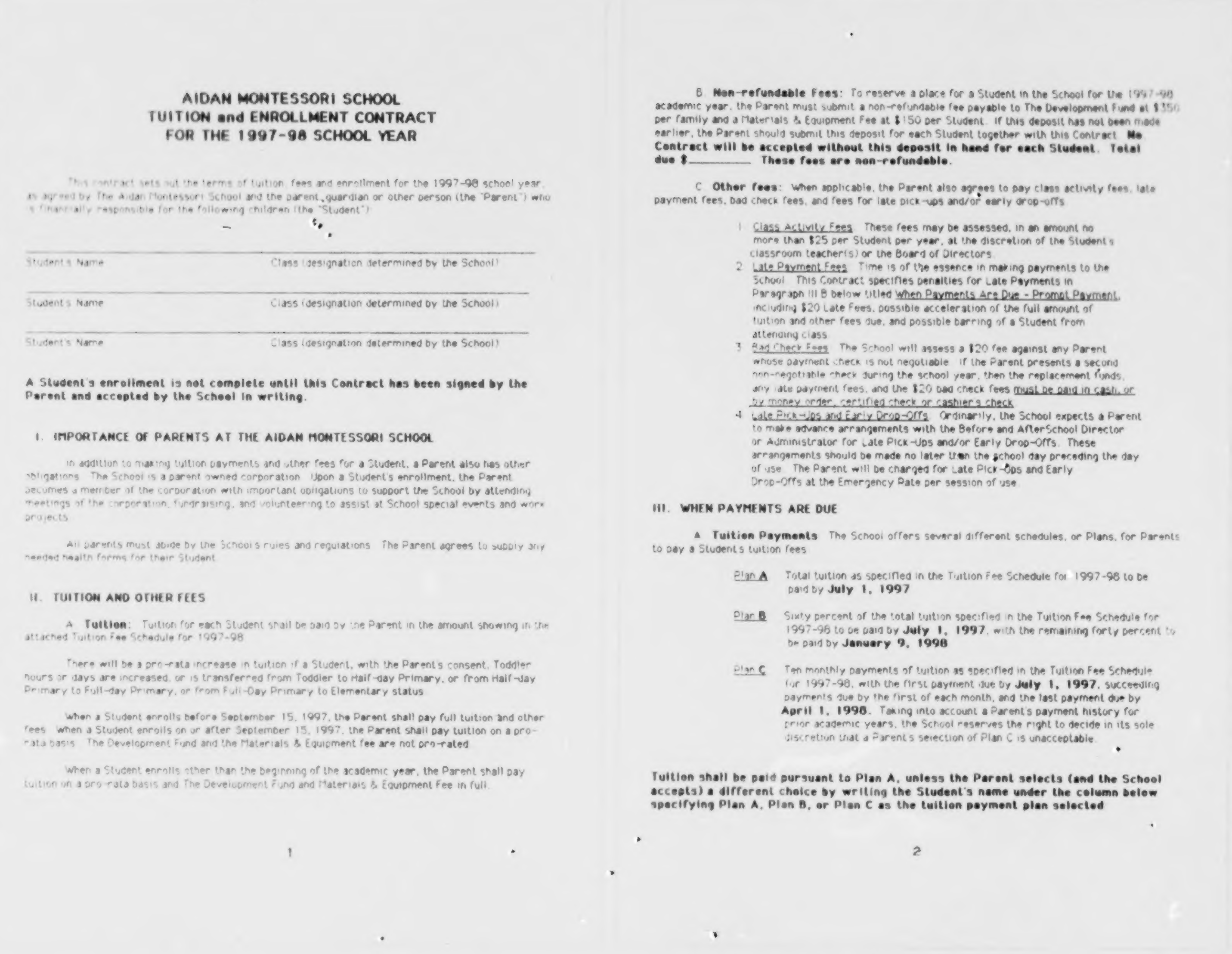
TUITION POLICY

Upon acceptance to Forest Bluff School, you will receive a letter relaying individualized information about tuition and fees, and requesting a non-refundable deposit. Payment of the tuition deposit confirms your intent to enroll your child at Forest Bluff School for the 1998/99 school year. The deposit is a minimum payment, regardless of when the student is enrolled. Payment of full tuition is due before your child begins school. (If your child enters Forest Bluff School mid-year, the tuition is pro-rated accordingly.) *Tuition is not refunded after the school year commences.*

This schedule shows tuition and fees at a glance, in relation to program offerings.

Enrollment Contract, Aidan Montessori School (Washington, DC)

Given the transience in people's lives, tuition contracts are being used at many schools as a safeguard against bad debts as well as a clear representation of policies regarding payment schedule, installment plans, fee structure, late fees, late pickups and early drop-offs, and related tuition policies. These three examples show a variety of approaches.



AIDAN MONTESSORI SCHOOL
TUITION and ENROLLMENT CONTRACT
FOR THE 1997-98 SCHOOL YEAR

This contract sets out the terms of tuition, fees and enrollment for the 1997-98 school year, as agreed by The Aidan Montessori School and the parent, guardian or other person (the "Parent") who is financially responsible for the following children (the "Student"):

Student's Name Class (designation determined by the School)

Student's Name Class (designation determined by the School)

Student's Name Class (designation determined by the School)

A Student's enrollment is not complete until this Contract has been signed by the Parent and accepted by the School in writing.

I. IMPORTANCE OF PARENTS AT THE AIDAN MONTESSORI SCHOOL

In addition to making tuition payments and other fees for a Student, a Parent also has other obligations. The School is a parent owned corporation. Upon a Student's enrollment, the Parent becomes a member of the corporation with important obligations to support the School by attending meetings of the corporation, fundraising, and volunteering to assist at School special events and work projects.

All parents must abide by the School's rules and regulations. The Parent agrees to supply any needed health forms for their Student.

II. TUITION AND OTHER FEES

A. **Tuition:** Tuition for each Student shall be paid by the Parent in the amount showing in the attached Tuition Fee Schedule for 1997-98.

There will be a pro-rata increase in tuition if a Student, with the Parent's consent, Toddler hours or days are increased, or is transferred from Toddler to Half-day Primary, or from Half-day Primary to Full-day Primary, or from Full-Day Primary to Elementary status.

When a Student enrolls before September 15, 1997, the Parent shall pay full tuition and other fees. When a Student enrolls on or after September 15, 1997, the Parent shall pay tuition on a pro-rata basis. The Development Fund and the Materials & Equipment fee are not pro-rated.

When a Student enrolls other than the beginning of the academic year, the Parent shall pay tuition on a pro-rata basis and The Development Fund and Materials & Equipment Fee in full.

1

B. **Non-refundable Fees:** To reserve a place for a Student in the School for the 1997-98 academic year, the Parent must submit a non-refundable fee payable to The Development Fund at $350 per family and a Materials & Equipment Fee at $150 per Student. If this deposit has not been made earlier, the Parent should submit this deposit for each Student together with this Contract. **No Contract will be accepted without this deposit in hand for each Student. Total due $_________ These fees are non-refundable.**

C. **Other fees:** When applicable, the Parent also agrees to pay class activity fees, late payment fees, bad check fees, and fees for late pick-ups and/or early drop-offs.

1. Class Activity Fees. These fees may be assessed, in an amount no more than $25 per Student per year, at the discretion of the Student's classroom teacher(s) or the Board of Directors.
2. Late Payment Fees. Time is of the essence in making payments to the School. This Contract specifies penalties for Late Payments in Paragraph III B below titled When Payments Are Due - Prompt Payment, including $20 Late Fees, possible acceleration of the full amount of tuition and other fees due, and possible barring of a Student from attending class.
3. Bad Check Fees. The School will assess a $20 fee against any Parent whose payment check is not negotiable. If the Parent presents a second non-negotiable check during the school year, then the replacement funds, any late payment fees, and the $20 bad check fees must be paid in cash, or by money order, certified check or cashier's check.
4. Late Pick-Ups and Early Drop-Offs. Ordinarily, the School expects a Parent to make advance arrangements with the Before and AfterSchool Director or Administrator for Late Pick-Ups and/or Early Drop-Offs. These arrangements should be made no later than the school day preceding the day of use. The Parent will be charged for Late Pick-Ups and Early Drop-Offs at the Emergency Rate per session of use.

III. WHEN PAYMENTS ARE DUE

A. **Tuition Payments.** The School offers several different schedules, or Plans, for Parents to pay a Student's tuition fees.

Plan A	Total tuition as specified in the Tuition Fee Schedule for 1997-98 to be paid by **July 1, 1997**
Plan B	Sixty percent of the total tuition specified in the Tuition Fee Schedule for 1997-98 to be paid by **July 1, 1997**, with the remaining forty percent to be paid by **January 9, 1998**
Plan C	Ten monthly payments of tuition as specified in the Tuition Fee Schedule for 1997-98, with the first payment due by **July 1, 1997**, succeeding payments due by the first of each month, and the last payment due by **April 1, 1998.** Taking into account a Parent's payment history for prior academic years, the School reserves the right to decide in its sole discretion that a Parent's selection of Plan C is unacceptable.

Tuition shall be paid pursuant to Plan A, unless the Parent selects (and the School accepts) a different choice by writing the Student's name under the column below specifying Plan A, Plan B, or Plan C as the tuition payment plan selected

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BEST COPY AVAILABLE

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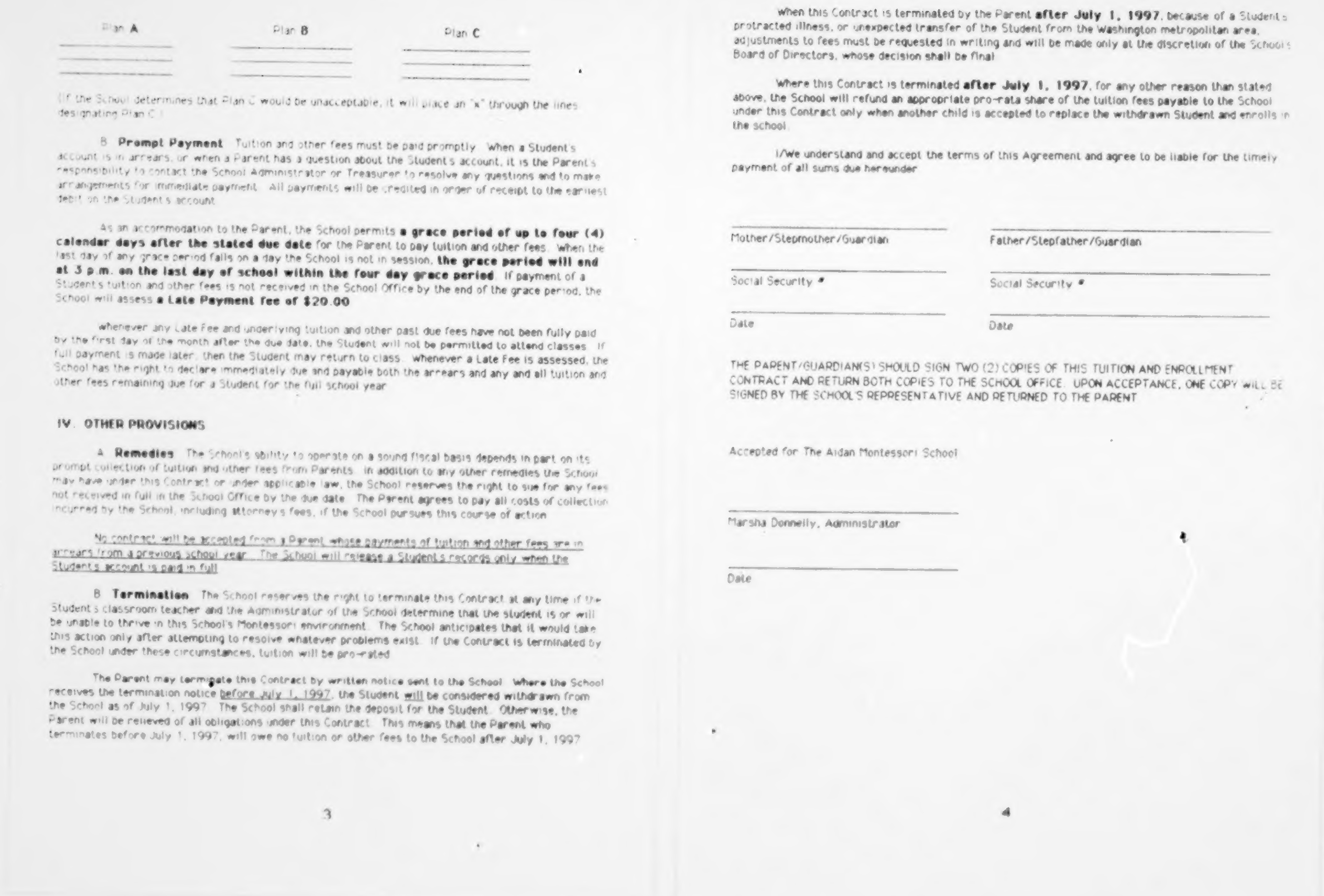
Enrollment Contract, Aidan Montessori School (continued)



Plan **A** Plan **B** Plan **C**

(If the School determines that Plan C would be unacceptable, it will place an "x" through the lines designating Plan C.)

B **Prompt Payment** Tuition and other fees must be paid promptly. When a Student's account is in arrears, or when a Parent has a question about the Student's account, it is the Parent's responsibility to contact the School Administrator or Treasurer to resolve any questions and to make arrangements for immediate payment. All payments will be credited in order of receipt to the earliest debit on the Student's account.

As an accommodation to the Parent, the School permits **a grace period of up to four (4) calendar days after the stated due date** for the Parent to pay tuition and other fees. When the last day of any grace period falls on a day the School is not in session, **the grace period will end at 3 p.m. on the last day of school within the four day grace period**. If payment of a Student's tuition and other fees is not received in the School Office by the end of the grace period, the School will assess **a Late Payment fee of $20.00**.

whenever any Late Fee and underlying tuition and other past due fees have not been fully paid by the first day of the month after the due date, the Student will not be permitted to attend classes. If full payment is made later, then the Student may return to class. Whenever a Late Fee is assessed, the School has the right to declare immediately due and payable both the arrears and any and all tuition and other fees remaining due for a Student for the full school year.

IV. OTHER PROVISIONS

A **Remedies** The School's ability to operate on a sound fiscal basis depends in part on its prompt collection of tuition and other fees from Parents. In addition to any other remedies the School may have under this Contract or under applicable law, the School reserves the right to sue for any fees not received in full in the School Office by the due date. The Parent agrees to pay all costs of collection incurred by the School, including attorney's fees, if the School pursues this course of action.

No contract will be accepted from a Parent whose payments of tuition and other fees are in arrears from a previous school year. The School will release a Student's records only when the Student's account is paid in full.

B **Termination** The School reserves the right to terminate this Contract at any time if the Student's classroom teacher and the Administrator of the School determine that the student is or will be unable to thrive in this School's Montessori environment. The School anticipates that it would take this action only after attempting to resolve whatever problems exist. If the Contract is terminated by the School under these circumstances, tuition will be pro-rated.

The Parent may terminate this Contract by written notice sent to the School. Where the School receives the termination notice before July 1, 1997, the Student will be considered withdrawn from the School as of July 1, 1997. The School shall retain the deposit for the Student. Otherwise, the Parent will be relieved of all obligations under this Contract. This means that the Parent who terminates before July 1, 1997, will owe no tuition or other fees to the School after July 1, 1997.

3

When this Contract is terminated by the Parent **after July 1, 1997**, because of a Student's protracted illness, or unexpected transfer of the Student from the Washington metropolitan area, adjustments to fees must be requested in writing and will be made only at the discretion of the School's Board of Directors, whose decision shall be final.

Where this Contract is terminated **after July 1, 1997**, for any other reason than stated above, the School will refund an appropriate pro-rata share of the tuition fees payable to the School under this Contract only when another child is accepted to replace the withdrawn Student and enrolls in the school.

I/We understand and accept the terms of this Agreement and agree to be liable for the timely payment of all sums due hereunder.

Mother/Stepmother/Guardian

Social Security #

Date

Father/Stepfather/Guardian

Social Security #

Date

THE PARENT/GUARDIAN(S) SHOULD SIGN TWO (2) COPIES OF THIS TUITION AND ENROLLMENT CONTRACT AND RETURN BOTH COPIES TO THE SCHOOL OFFICE. UPON ACCEPTANCE, ONE COPY WILL BE SIGNED BY THE SCHOOL'S REPRESENTATIVE AND RETURNED TO THE PARENT.

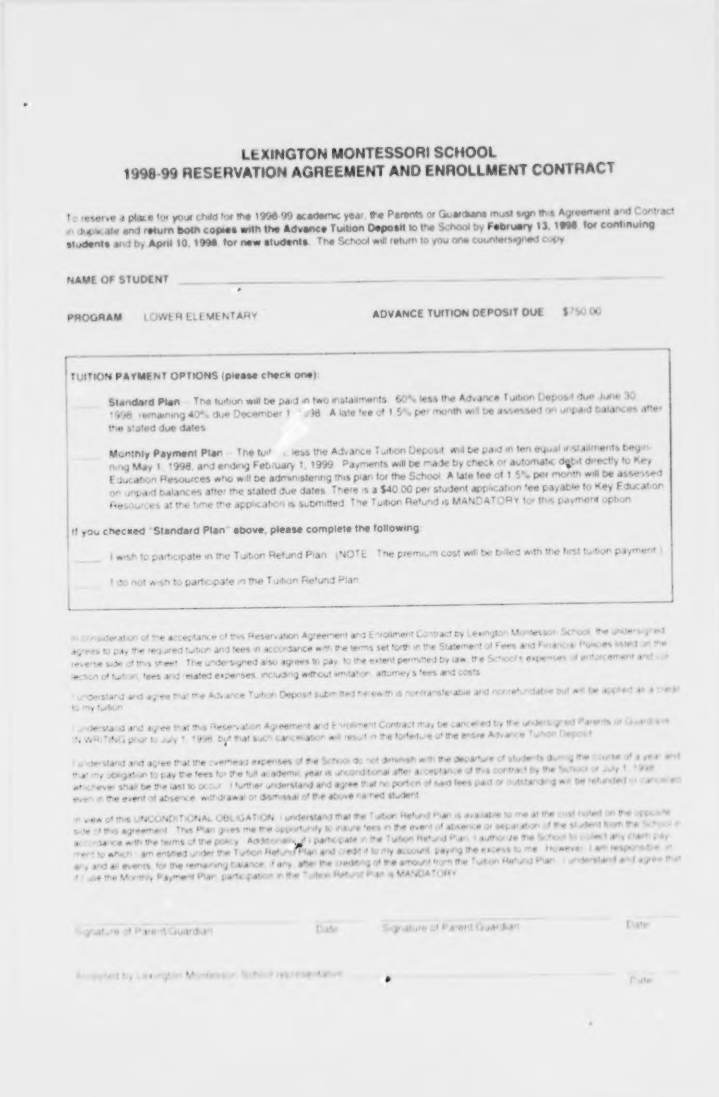
Accepted for The Aidan Montessori School

Marsha Donnelly, Administrator

Date

4

Enrollment Contract, Lexington Montessori School (Lexington, MA)



LEXINGTON MONTESSORI SCHOOL
1998-99 RESERVATION AGREEMENT AND ENROLLMENT CONTRACT

To reserve a place for your child for the 1998-99 academic year, the Parents or Guardians must sign this Agreement and Contract in duplicate and **return both copies with the Advance Tuition Deposit** to the School by **February 13, 1998, for continuing students** and by **April 10, 1998, for new students.** The School will return to you one countersigned copy.

NAME OF STUDENT ______________________________

PROGRAM LOWER ELEMENTARY **ADVANCE TUITION DEPOSIT DUE** $750.00

TUITION PAYMENT OPTIONS (please check one):

____ **Standard Plan** – The tuition will be paid in two installments: 60% less the Advance Tuition Deposit due June 30, 1998; remaining 40% due December 1, 1998. A late fee of 1.5% per month will be assessed on unpaid balances after the stated due dates.

____ **Monthly Payment Plan** – The tuition, less the Advance Tuition Deposit, will be paid in ten equal installments beginning May 1, 1998, and ending February 1, 1999. Payments will be made by check or automatic debit directly to Key Education Resources who will be administering this plan for the School. A late fee of 1.5% per month will be assessed on unpaid balances after the stated due dates. There is a $40.00 per student application fee payable to Key Education Resources at the time the application is submitted. The Tuition Refund is MANDATORY for this payment option.

If you checked "Standard Plan" above, please complete the following:

____ I wish to participate in the Tuition Refund Plan. (NOTE: The premium cost will be billed with the first tuition payment.)

____ I do not wish to participate in the Tuition Refund Plan.

In consideration of the acceptance of this Reservation Agreement and Enrollment Contract by Lexington Montessori School, the undersigned agrees to pay the required tuition and fees in accordance with the terms set forth in the Statement of Fees and Financial Policies listed on the reverse side of this sheet. The undersigned also agrees to pay, to the extent permitted by law, the School's expenses of enforcement and collection of tuition, fees and related expenses, including without limitation, attorney's fees and costs.

I understand and agree that the Advance Tuition Deposit submitted herewith is nontransferable and nonrefundable but will be applied as a credit to my tuition.

I understand and agree that this Reservation Agreement and Enrollment Contract may be cancelled by the undersigned Parents or Guardians IN WRITING prior to July 1, 1998, but that such cancellation will result in the forfeiture of the entire Advance Tuition Deposit.

I understand and agree that the overhead expenses of the School do not diminish with the departure of students during the course of a year and that my obligation to pay the fees for the full academic year is unconditional after acceptance of this contract by the School or July 1, 1998, whichever shall be the last to occur. I further understand and agree that no portion of said fees paid or outstanding will be refunded or cancelled even in the event of absence, withdrawal or dismissal of the above named student.

In view of this UNCONDITIONAL OBLIGATION, I understand that the Tuition Refund Plan is available to me at the cost noted on the opposite side of this agreement. This Plan gives me the opportunity to insure fees in the event of absence or separation of the student from the School in accordance with the terms of the policy. Additionally, if I participate in the Tuition Refund Plan, I authorize the School to collect any claim payment to which I am entitled under the Tuition Refund Plan and credit it to my account, paying the excess to me. However, I am responsible, in any and all events, for the remaining balance, if any, after the crediting of the amount from the Tuition Refund Plan. I understand and agree that if I use the Monthly Payment Plan, participation in the Tuition Refund Plan is MANDATORY.

______________________ Signature of Parent/Guardian ________ Date ______________________ Signature of Parent/Guardian ________ Date

Accepted by Lexington Montessori School representative ______________________ Date

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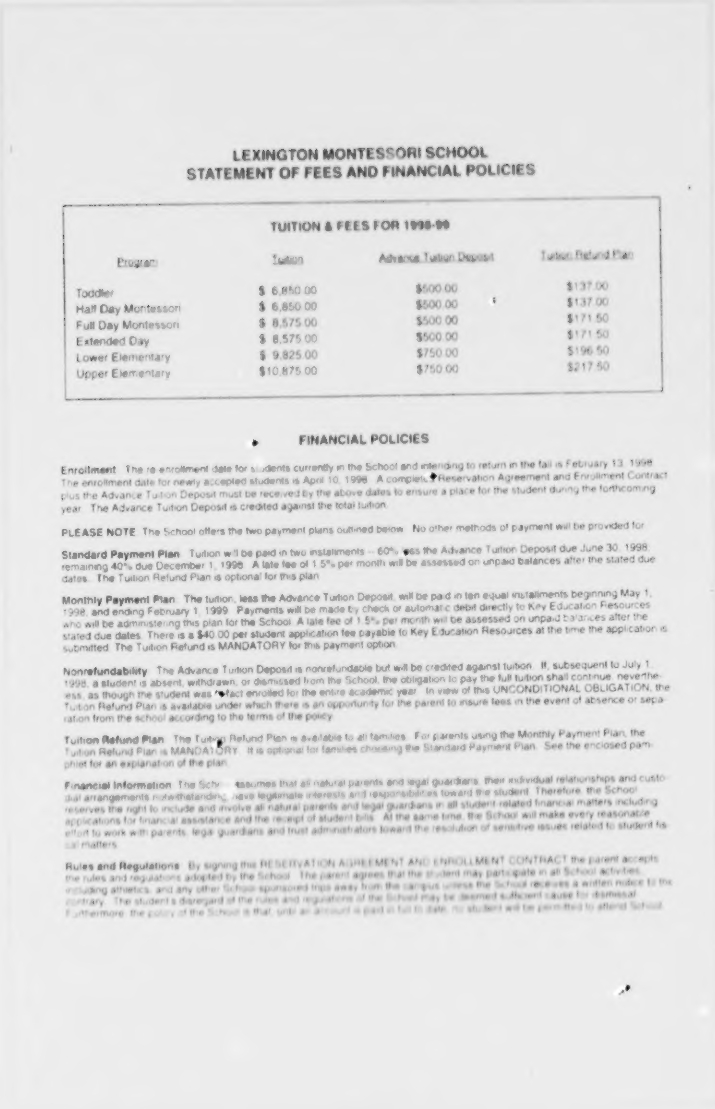


LEXINGTON MONTESSORI SCHOOL
STATEMENT OF FEES AND FINANCIAL POLICIES

TUITION & FEES FOR 1998-99

Program	Tuition	Advance Tuition Deposit	Tuition Refund Plan
Toddler	$ 6,850.00	$500.00	$137.00
Half Day Montessori	$ 6,850.00	$500.00	$137.00
Full Day Montessori	$ 8,575.00	$500.00	$171.50
Extended Day	$ 8,575.00	$500.00	$171.50
Lower Elementary	$ 9,825.00	$750.00	$196.50
Upper Elementary	$10,875.00	$750.00	$217.50

FINANCIAL POLICIES

Enrollment The re-enrollment date for students currently in the School and intending to return in the fall is February 13, 1998. The enrollment date for newly accepted students is April 10, 1998. A completed Reservation Agreement and Enrollment Contract plus the Advance Tuition Deposit must be received by the above dates to ensure a place for the student during the forthcoming year. The Advance Tuition Deposit is credited against the total tuition.

PLEASE NOTE The School offers the two payment plans outlined below. No other methods of payment will be provided for.

Standard Payment Plan Tuition will be paid in two installments – 60% less the Advance Tuition Deposit due June 30, 1998; remaining 40% due December 1, 1998. A late fee of 1.5% per month will be assessed on unpaid balances after the stated due dates. The Tuition Refund Plan is optional for this plan.

Monthly Payment Plan The tuition, less the Advance Tuition Deposit, will be paid in ten equal installments beginning May 1, 1998, and ending February 1, 1999. Payments will be made by check or automatic debit directly to Key Education Resources who will be administering this plan for the School. A late fee of 1.5% per month will be assessed on unpaid balances after the stated due dates. There is a $40.00 per student application fee payable to Key Education Resources at the time the application is submitted. The Tuition Refund is MANDATORY for this payment option.

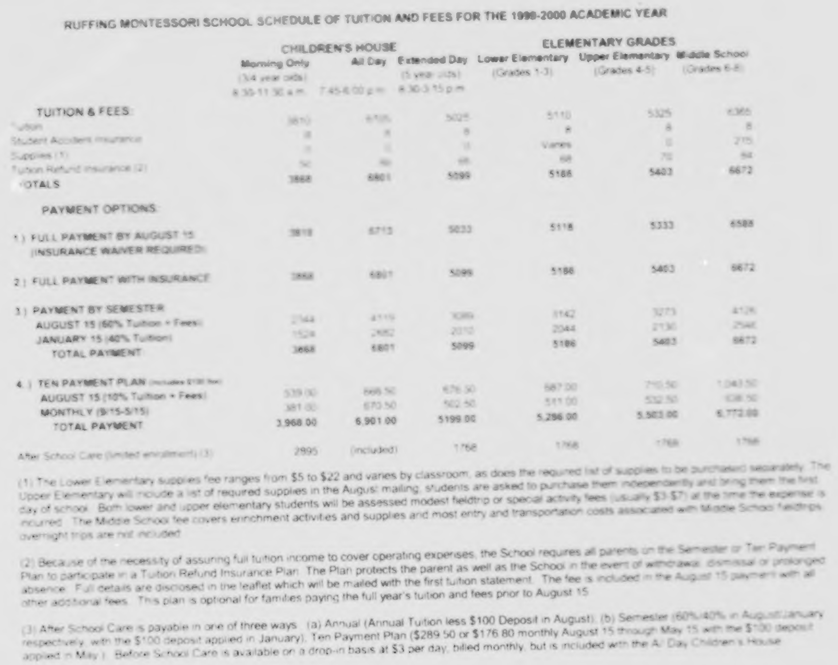
Nonrefundability The Advance Tuition Deposit is nonrefundable but will be credited against tuition. If, subsequent to July 1, 1998, a student is absent, withdrawn, or dismissed from the School, the obligation to pay the full tuition shall continue, nevertheless, as though the student was in fact enrolled for the entire academic year. In view of this UNCONDITIONAL OBLIGATION, the Tuition Refund Plan is available under which there is an opportunity for the parent to insure fees in the event of absence or separation from the school according to the terms of the policy.

Tuition Refund Plan The Tuition Refund Plan is available to all families. For parents using the Monthly Payment Plan, the Tuition Refund Plan is MANDATORY. It is optional for families choosing the Standard Payment Plan. See the enclosed pamphlet for an explanation of the plan.

Financial Information The School assumes that all natural parents and legal guardians, their individual relationships and custodial arrangements notwithstanding, have legitimate interests and responsibilities toward the student. Therefore, the School reserves the right to include and involve all natural parents and legal guardians in all student-related financial matters including applications for financial assistance and the receipt of student bills. At the same time, the School will make every reasonable effort to work with parents, legal guardians and trust administrators toward the resolution of sensitive issues related to student fiscal matters.

Rules and Regulations By signing this RESERVATION AGREEMENT AND ENROLLMENT CONTRACT the parent accepts the rules and regulations adopted by the School. The parent agrees that the student may participate in all School activities, including athletics, and any other School-sponsored trips away from the campus unless the School receives a written notice to the contrary. The student's disregard of the rules and regulations of the School may be deemed sufficient cause for dismissal. Furthermore, the policy of the School is that, until an account is paid in full to date, no student will be permitted to attend School.

Enrollment Agreement, Ruffing Montessori School (Cleveland Heights, OH)



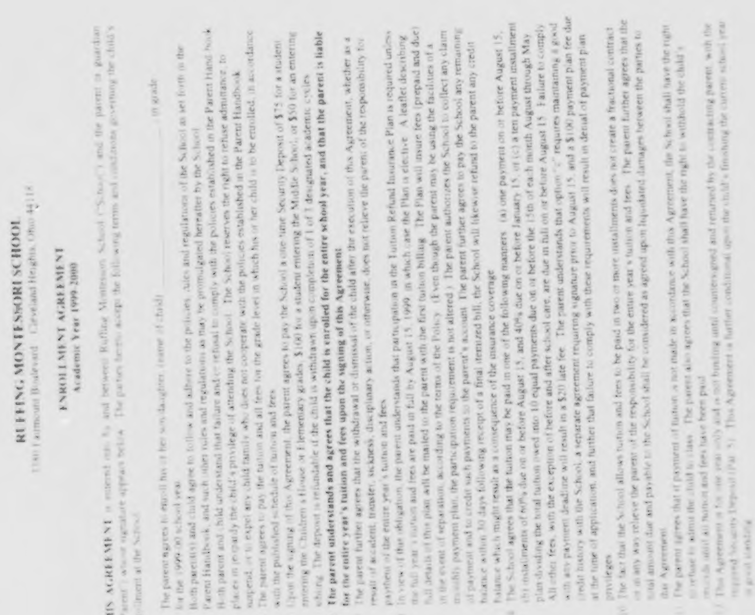
RUFFING MONTESSORI SCHOOL SCHEDULE OF TUITION AND FEES FOR THE 1999-2000 ACADEMIC YEAR

	CHILDREN'S HOUSE			ELEMENTARY GRADES		
	Morning Only (3/4 year olds) 8:30-11:30 a.m.	All Day 7:45-6:00 p.m.	Extended Day (5 year olds) 8:30-3:15 p.m.	Lower Elementary (Grades 1-3)	Upper Elementary (Grades 4-5)	Middle School (Grades 6-8)
TUITION & FEES:						
Tuition	3810	6705	5025	5110	5325	6305
Student Accident Insurance	8	8	8	8	8	8
Supplies (1)	0	0	0	Varies	0	275
Tuition Refund Insurance (2)	50	88	66	68	70	84
TOTALS	3868	6801	5099	5186	5403	6672
PAYMENT OPTIONS:						
1.) FULL PAYMENT BY AUGUST 15 (INSURANCE WAIVER REQUIRED)	3818	6713	5033	5118	5333	6588
2.) FULL PAYMENT WITH INSURANCE	3868	6801	5099	5186	5403	6672
3.) PAYMENT BY SEMESTER						
AUGUST 15 (60% Tuition + Fees)	2344	4119	3089	3142	3273	4126
JANUARY 15 (40% Tuition)	1524	2682	2010	2044	2130	2546
TOTAL PAYMENT	3868	6801	5099	5186	5403	6672
4.) TEN PAYMENT PLAN (includes $100 fee)						
AUGUST 15 (10% Tuition + Fees)	539.00	866.50	676.50	687.00	710.50	1,043.50
MONTHLY (9/15-5/15)	381.00	670.50	502.50	511.00	532.50	636.50
TOTAL PAYMENT	3,968.00	6,901.00	5199.00	5,286.00	5,503.00	6,772.00
After School Care (limited enrollment) (3)	2995	(included)	1768	1768	1768	1768

(1) The Lower Elementary supplies fee ranges from $5 to $22 and varies by classroom, as does the required list of supplies to be purchased separately. The Upper Elementary will include a list of required supplies in the August mailing; students are asked to purchase them independently and bring them the first day of school. Both lower and upper elementary students will be assessed modest fieldtrip or special activity fees (usually $3-$7) at the time the expense is incurred. The Middle School fee covers enrichment activities and supplies and most entry and transportation costs associated with Middle School fieldtrips; overnight trips are not included.

(2) Because of the necessity of assuring full tuition income to cover operating expenses, the School requires all parents on the Semester or Ten Payment Plan to participate in a Tuition Refund Insurance Plan. The Plan protects the parent as well as the School in the event of withdrawal, dismissal or prolonged absence. Full details are disclosed in the leaflet which will be mailed with the first tuition statement. The fee is included in the August 15 payment with all other additional fees. This plan is optional for families paying the full year's tuition and fees prior to August 15.

(3) After School Care is payable in one of three ways: (a) Annual (Annual Tuition less $100 Deposit in August); (b) Semester (60%/40% in August/January respectively, with the $100 deposit applied in January); Ten Payment Plan ($289.50 or $176.80 monthly August 15 through May 15 with the $100 deposit applied in May.) Before School Care is available on a drop-in basis at $3 per day, billed monthly, but is included with the All Day Children's House



RUFFING MONTESSORI SCHOOL

1380 Fairmount Boulevard · Cleveland Heights, Ohio 44118

ENROLLMENT AGREEMENT

Academic Year 1999-2000

THIS AGREEMENT is entered into by and between Ruffing Montessori School ("School") and the parent or guardian ("Parent") whose signature appears below. The parties hereto accept the following terms and conditions governing the child's enrollment at the School.

1. The parent agrees to enroll his or her son/daughter, (name of child) ________________________, in grade ___ for the 1999-00 school year.
2. Both parent(s) and child agree to follow and adhere to the policies, rules and regulations of the School as set forth in the Parent Handbook, and such other rules and regulations as may be promulgated hereafter by the School.
3. Both parent and child understand that failure and/or refusal to comply with the policies established in the Parent Handbook places in jeopardy the child's privilege of attending the School. The School reserves the right to refuse admittance, to suspend, or to expel any child/family who does not cooperate with the policies established in the Parent Handbook.
4. The parent agrees to pay the tuition and all fees for the grade level in which his or her child is to be enrolled, in accordance with the published schedule of tuition and fees.
5. Upon the signing of this Agreement, the parent agrees to pay the School a one-time Security Deposit of $75 for a student entering the Children's House or Elementary grades, $100 for a student entering the Middle School, or $50 for an entering sibling. The deposit is refundable if the child is withdrawn upon completion of 1 of 3 designated academic cycles.
6. **The parent understands and agrees that the child is enrolled for the entire school year, and that the parent is liable for the entire year's tuition and fees upon the signing of this Agreement.**
7. The parent further agrees that the withdrawal or dismissal of the child after the execution of this Agreement, whether as a result of accident, transfer, sickness, disciplinary action, or otherwise, does not relieve the parent of the responsibility for payment of the entire year's tuition and fees.
8. In view of this obligation, the parent understands that participation in the Tuition Refund Insurance Plan is required unless the full year's tuition and fees are paid in full by August 15, 1999, in which case the Plan is elective. A leaflet describing full details of this plan will be mailed to the parent with the first tuition billing. The Plan will insure fees (prepaid and due) in the event of separation, according to the terms of the Policy. (Even though the parent may be using the facilities of a monthly payment plan, the participation requirement is not altered.) The parent authorizes the School to collect any claim of payment and to credit such payments to the parent's account. The parent further agrees to pay the School any remaining balance within 30 days following receipt of a final itemized bill; the School will likewise refund to the parent any credit balance which might result as a consequence of the insurance coverage.
9. The School agrees that the tuition may be paid in one of the following manners: (a) one payment on or before August 15, (b) installments of 60% due on or before August 15, and 40% due on or before January 15, or (c) a ten payment installment plan dividing the total tuition owed into 10 equal payments due on or before the 15th of each month August through May. All other fees, with the exception of before and after school care, are due in full on or before August 15. Failure to comply with any payment deadline will result in a $20 late fee. The parent understands that option "c" requires maintaining a good credit history with the School, a separate agreement requiring signature prior to August 15, and a $100 payment plan fee due at the time of application, and further that failure to comply with these requirements will result in denial of payment plan privileges.
10. The fact that the School allows tuition and fees to be paid in two or more installments does not create a fractional contract or in any way relieve the parent of the responsibility for the entire year's tuition and fees. The parent further agrees that the total amount due and payable to the School shall be considered as agreed upon liquidated damages between the parties to this Agreement.
11. The parent agrees that if payment of tuition is not made in accordance with this Agreement, the School shall have the right to refuse to admit the child to class. The parent also agrees that the School shall have the right to withhold the child's records until all tuition and fees have been paid.
12. This Agreement is for one year only and is not binding until countersigned and returned by the contracting parent, with the required Security Deposit (Par. 5). This Agreement is further conditional upon the child's finishing the current school year in good standing.

Dated this ____ day of ________________, 1999

________________________ Barbara Kahn, Director of Admissions

________________________ Signature of Parent(s) or Guardian(s)

PARENT COPY

3. Financial Operations

Re-Enrollment Agreement, Ruffing Montessori School (Cleveland Heights, OH)

RUFFING MONTESSORI SCHOOL SCHEDULE OF TUITION AND FEES FOR THE 1999-2000 ACADEMIC YEAR

	CHILDREN'S HOUSE			ELEMENTARY GRADES		
	Morning Only (3/4 year olds) 8:30-11:30 a.m.	All Day 7:45-3:15 p.m.	Extended Day (5 year olds) 8:30-3:15 p.m.	Lower Elementary (Grades 1-3)	Upper Elementary (Grades 4-5)	Middle School (Grades 6-8)
TUITION & FEES						
Tuition	3810	6705	5025	5110	5325	6365
Student Accident Insurance	8	8	8	8	8	8
Supplies (1)	0	0	0	varies	0	215
Tuition Refund Insurance (2)	50	88	66	68	70	84
TOTALS	3868	6801	5099	5186	5403	6672
PAYMENT OPTIONS						
1.) FULL PAYMENT BY AUGUST 15	3818	6713	5033	5118	5333	6588
Tuition Advance applied	-200	-200	-200	-200	-200	-200
TOTAL (insurance waiver required)	3618	6513	4833	4918	5133	6388
2.) FULL PAYMENT WITH INSURANCE	3868	6801	5099	5186	5403	6672
Tuition Advance applied	-200	-200	-200	-200	-200	-200
TOTAL PAYMENT	3668	6601	4899	4986	5203	6472
3.) PAYMENT BY SEMESTER						
AUGUST 15 (60% Tuition+Fees)	2344	4119	3089	3142	3273	4126
JANUARY 15 (40% Tuition)	1524	2682	2010	2044	2130	2546
Tuition Advance applied	-200	-200	-200	-200	-200	-200
TOTAL PAYMENT	3668	6601	4899	4986	5203	6472
4.) TEN PAYMENT PLAN (includes $100 fee)						
AUGUST 15 (10% Tuition+Fees)	539.00	866.50	676.50	687.00	710.50	1,043.50
MONTHLY (9/15-4/15)	381.00	670.50	502.50	511.00	532.50	636.50
May 15 (with Tuition Advance applied)	181.00	470.50	302.50	311.00	332.50	436.50
TOTAL PAYMENT	3,768.00	6,701.00	4,999.00	5,086.00	5,303.00	6,572.00
After School Care (limited enrollment) (3)	2895	(included)	1768	1768	1768	1768

(1) The fee for student accident insurance is approximate; the exact cost will be available in July.

(2) The fees for supplies are approximate before July. Lower Elementary supplies will be distributed in each classroom the first day of school. The Upper Elementary will include a list of required supplies in the August mailing; students are asked to purchase them independently and bring them the first day of school. Both lower and upper elementary students will be assessed modest fieldtrip or special activity fees (usually $3-$7) at the time the expense is incurred. The Middle School fee covers enrichment activities and supplies and all entry and transportation costs associated with Middle School fieldtrips. Overnight trips are not included and can be expected to cost approximately $350, payable prior to departure.

(3) Tuition Refund Insurance is optional for families paying the full year's tuition and fees prior to August 15. Because of the necessity of assuring full tuition income to cover operating expenses, the School requires all parents by the Semester or Ten Payment Plan to participate in a tuition refund insurance plan. The plan protects the parent as well as the School in the event of withdrawal, dismissal or prolonged absence. Full details are disclosed in the leaflet which will be mailed with the first tuition statement. The fee is included in the August 15 payment with all other additional fees.

(4) After School Care is payable in one of three ways: (a) Annual (Annual Tuition less $100 Advance in August); (b) Semester ($1737/$1158 or $1061/$707, August/January with $100 credit applied in January); Ten Payment Plan ($289.50 or $176.80 monthly August 15 through May 15 with $100 credit applied in May.)

RUFFING MONTESSORI SCHOOL
1380 Fairmount Boulevard – Cleveland Heights, Ohio 44118

RE-ENROLLMENT AGREEMENT
Academic Year 1999-2000

THIS AGREEMENT is entered into by and between Ruffing Montessori School ("School") and the parent or guardian ("Parent") whose signature appears below. The parties hereto accept the following terms and conditions governing the child's re-enrollment at the School.

1. The parent agrees to enroll his or her son/daughter (name of child) ________________ in grade ______ for the 1999-00 school year.
2. Both parent(s) and child agree to follow and adhere to the policies, rules and regulations of the School as set forth in the Parent Handbook, and such other rules and regulations as may be promulgated hereafter by the School.
3. The parent understands that failure to comply with such policies as established and set forth (Par. 2 above) places in jeopardy the child's privilege of attending the School. In the event of non-compliance and the School's inability to work towards a satisfactory resolution with the child and/or parent, the School reserves the right to refuse admittance, suspend, or expel the child and to revoke this or every Agreement signed by the parent.
4. The parent agrees to pay the tuition and all fees for the grade level in which his or her child is to be enrolled, in accordance with the published schedule of tuition and fees.
5. Upon the signing of this Agreement, the parent agrees to pay the School a $200 tuition advance, which is non-refundable. This amount will be credited against the parent's final tuition payment for the academic year covered herein.
6. **The parent understands and agrees that the child is enrolled for the entire school year, and that the parent is liable for the entire year's tuition and fees upon the signing of this Agreement.**
7. The parent further agrees that the withdrawal or dismissal of the child after the execution of this Agreement, whether as a result of accident, sickness, disciplinary action, or otherwise, does not relieve the parent of the responsibility for payment of the entire year's tuition and fees.
8. In view of this obligation, the parent understands that participation in the Tuition Refund Insurance Plan is required unless the full year's tuition and fees are paid in full by August 15, 1999, in which case the Plan is elective. A leaflet describing full details of this plan will be included with the first tuition billing. The parent understands that said Plan covers tuition and provides benefits regardless of whether or not the obligation has already been satisfied by the parent at the time of separation, and that the benefit payment is based upon a percentage of the unused yearly insured fees. In the event of withdrawal, the parent authorizes the School to collect any claim of payment and to credit such payments to the parent's account. The parent further agrees to pay the School any remaining balance within 30 days following receipt of a final itemized bill; the School will likewise refund to the parent any credit balance which might result as a consequence of the insurance coverage.
9. The School agrees that the tuition may be paid in one of the following manners: (a) one payment on or before August 15, (b) installments of 60% due on or before August 15, and 40% due on or before January 15, or (c) a 10 payment installment plan dividing the total tuition owed into 10 equal payments due on or before the 15th of each month August through May. All other fees, with the exception of before and after school care, are due in full on or before August 15. Failure to comply with any payment deadline will result in a $20 late fee. The parent understands that option "(c)" requires a good credit history with the School, a separate agreement requiring signature prior to August 15, and a $100 payment plan fee due at the time of application, and further that failure to comply with these requirements will result in denial of the privilege of signing up for the 10 installment plan.
10. The fact that the School allows tuition and fees to be paid in two or more installments does not create a fractional contract or in any way relieve the parent of the responsibility for the entire year's tuition and fees. The parent further agrees that the total amount due and payable to the School shall be considered as agreed upon liquidated damages between the parties to this Agreement.
11. The parent agrees that if payment of tuition is not made in accordance with this Agreement, the School shall have the right to refuse to admit the child to class. The parent also agrees that the School shall have the right to withhold the child's records until all tuition and fees have been paid.
12. This Agreement is for one year only and is not binding until countersigned and returned by the contracting parent, along with the $200 tuition advance. This Agreement is contingent upon the child's finishing the current school year in good standing.

Dated this ______ day of ____________ 1999

Barbara Kahn, Director of Admissions   Signature of Parent(s) or Guardian(s)

PARENT COPY

This agreement is sent to parents in the spring, accompanied by a new tuition contract, in order to establish re-enrollment numbers. Some schools make their re-enrollment agreement inclusive enough that they can forego a separate tuition contract.

Salary Scales, Lake Country School (Minneapolis, MN) and Montessori Center of Oak Ridge (Oak Ridge, TN)

Lake Country School
Proposed Salary Scale
1998-99

Add on 1997-98 scale of $1,272 at all levels.

Without Montessori Training

	BA		MA
1	19,636.00		20,236.00
2	20,635.00	6.57%	21,235.00
3	21,544.00	6.27%	22,144.00
4	22,434.00	6.01%	23,034.00
5	23,189.00	5.80%	23,789.00
6	23,981.00	5.60%	24,581.00
7	24,815.00	5.40%	25,415.00
8	25,690.00	5.21%	26,290.00
9	26,586.00	5.02%	27,186.00
10	27,526.00	4.84%	28,126.00
11	28,538.00	4.65%	29,138.00
12	29,599.00	4.49%	30,199.00
13	30,631.00	4.33%	31,231.00
14	31,754.00	4.17%	32,354.00
15	32,980.00	4.01%	33,580.00

With Montessori Training

	BA	MA
1	20,136.00	20,736.00
2	21,135.00	21,735.00
3	22,044.00	22,644.00
4	22,934.00	23,534.00
5	23,689.00	24,289.00
6	24,481.00	25,081.00
7	25,315.00	25,915.00
8	26,190.00	26,790.00
9	27,086.00	27,686.00
10	28,026.00	28,626.00
11	29,038.00	29,638.00
12	30,099.00	30,699.00
13	31,131.00	31,731.00
14	32,254.00	32,854.00
15	33,480.00	34,080.00

MONTESSORI CENTER OF OAK RIDGE PAY SCALE

Years	Montessori Training/ Bachelor's Degree	Montessori Training/ BD in Elem. Education With Appropriate Endorsement Early Childhood, Pre-K-3	Montessori Training and Masters Degree in Education With Appropriate Endorsement Early Childhood, Pre-K-3
0	$18,000	$18,250	$18,500
1	$18,630	$18,889	$19,148
2	$19,282	$19,550	$19,818
3	$19,957	$20,234	$20,512
4	$20,655	$20,942	$21,230
5	$21,378	$21,675	$21,973
6	$22,126	$22,434	$22,742
7	$22,900	$23,219	$23,538
8	$23,702	$24,032	$24,362
9	$24,532	$24,873	$25,215
10	$25,391	$25,744	$26,098
11	$26,280	$26,645	$27,011
12	$27,200	$27,578	$27,956
13	$28,152	$28,543	$28,934
14	$29,137	$29,542	$29,947
15	$30,157	$30,576	$30,995
16		$31,646	$32,080
17		$32,754	$33,203
18		$33,900	$34,365
19		$35,087	$35,568
20		$36,315	$36,813

Note: BD refers to Bachelor's Degree

The Lake Country School salary scale shows lower percentage increases as seniority rises. When using a scale like this one, it is advisable to increase benefits for senior staff (continuing education, pension contributions, etc.) so as to avoid the appearance of penalizing seniority. The Montessori Center of Oak Ridge scale uses a constant percentage factor for all step increases.

The Prepared Environment and Architectural Design: A Developmental Perspective

With the emergent vision of Montessori across the planes of education, from infancy through adolescence, the Montessori profession is just beginning to define what it needs in order to provide concrete learning conditions for engaging children at every stage of development. This section establishes the foundation for new links between the universal needs of development and designed spaces. Architectural exemplars built for Montessori, past and present, form a beginning view for a future genre of architecture designed for human development.

Chapter 4. Implementing the Developmental Continuum 101

Chapter 5. The Architectural Expression of the Developmental Continuum 131

Implementing the Developmental Continuum

Introduction

This chapter is a bird's-eye view of the framework of the Montessori developmental continuum. It is not intended as a curriculum document or program description. Underlying this presentation is the sense that, perhaps for the first time in Montessori history, schools are now able to look at themselves as a developmental continuum with specific psychological characteristics and matching classroom attributes to aid these psychological characteristics for each age level. This chapter's Close-Up and FYI articles on all-day Montessori, the infant community, and the Erdkinder vision convey current aspects of Montessori development as it expands into the twenty-first century.

The Montessori Developmental Continuum

> "My vision of the future is no longer people taking exams and proceeding then on that certification . . . but of individuals passing from one stage of independence to a higher (one), by means of their own activity through their own effort of will, which constitutes the inner evolution of the individual." (Maria Montessori, *From Childhood to Adolescence*)

Montessori education is a flow experience; it builds on the continuing self-construction of the child–daily, weekly, yearly–for the duration of the program. It is an uninterrupted series of learning passages, a continuum based on Maria Montessori's theory of the Four Planes of Development. In Montessori's metaphorical language, "the successive levels of education must conform to the successive personalities of the child."

See the article "The Four Planes of Development" by Camillo Grazzini, listed under Curriculum Models and General Program Information in this chapter's Further Reading from NAMTA

See "Designing the Architectural Continuum" in Chapter 5

The prepared environments for the successive age levels are a series of articulated spaces that also constitute a continuum. Unfortunately, in the evolution of a Montessori school, it is all too easy to conceptualize the developmental continuum on a segmented basis: First, perhaps, comes the preschool, then the elementary, probably followed by an infant community and topped off by an adolescent program. Buildings may be designed segment by segment, without a concept of the whole. Teachers are trained segment by segment, each focused on his or her respective level.

The head of school must align all parts of the school with a vision of the whole. For example, a child who can read at the age of five is fully prepared to explore with the imagination that awakens at the elementary level by plunging into self-directed research in a variety of books. This independent research at the lower elementary level prepares the child for term papers and more specialized studies at the upper elementary level. A child who has become disciplined in following his or her interests at the upper elementary level can become a more dynamic interpreter of experiential learning at the adolescent level. Montessori teachers need to envision the developmental continuum in order to profoundly understand their own respective jobs.

The developmental continuum represents nearly a century of work. Looking at the Montessori timeline in Figure 1, it is easy to see that the preschool (1907) and elementary (1933) programs have the greatest duration. The Montessori adolescent program represents only 20 years of practice in North America. The infant program has only come into seasoned practice in the last 10 years in North America. All-day Montessori has only been visible here for about the last

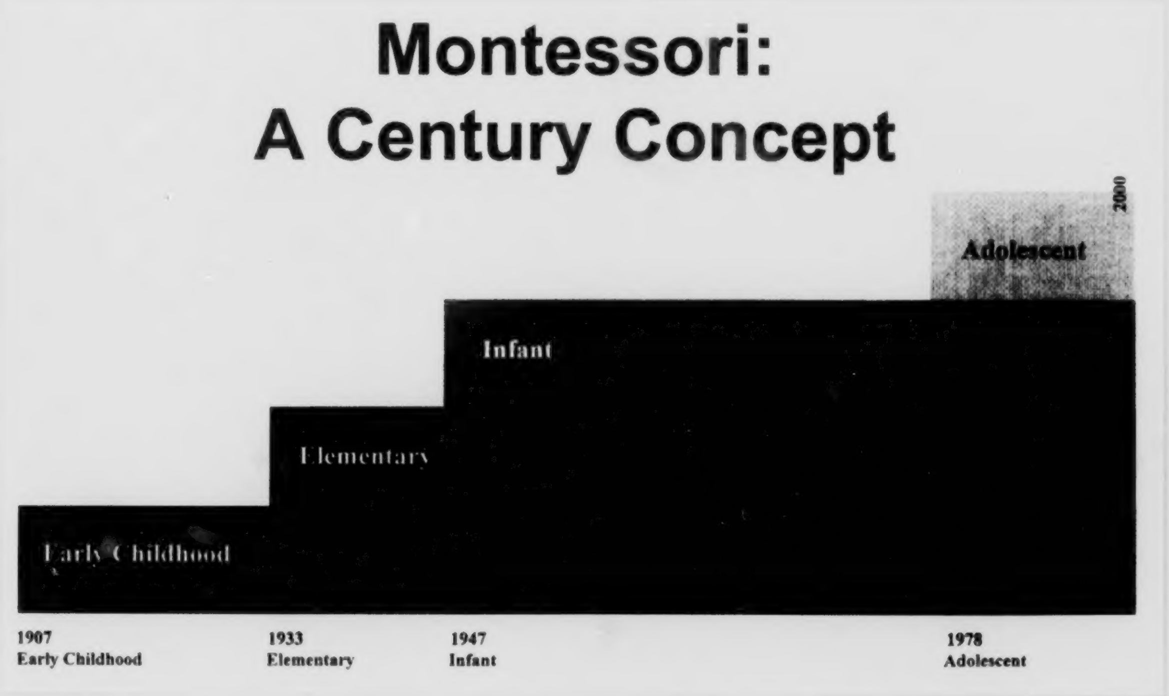


Figure 1.

eight years. Montessori pedagogy has great traditions, as well as programs that are young and experimental.

The following overview of the developmental continuum may help in the conceptualizing of a vision of the whole school.

The Montessori Infant Program (up to age 3)

The Montessori infant program has several components that offer a wide variety of options and opportunities for involvement by parents.

The Parent-Infant Class provides an environment in which parents and children interact alongside a Montessori-prepared adult who uses the environment to facilitate their interaction. Caregivers are taught how to observe what their babies do in order to know what materials to offer them. The parent and child attend a two-hour classroom session once or twice a week. The group has a limit of ten parent/infant combinations with two trained staff. A once-a-week, two-hour session, held in the afternoon without babies, involves presentation and discussion.

See this chapter's FYI article by AMI Assistants to Infancy trainer Judi Orion

The Nido (Italian for "nest") accommodates no more than nine children from two months to fourteen months of age with an adult-to-child ratio of one to three. It includes a movement area equipped with customized stands, stairs, and bars for pulling up; a quiet sleeping area with individual mats; an eating area equipped with child-sized tables and chairs instead of highchairs; and a physical care area for bathing, changing, etc.

The Infant Community (sometimes called "Toddler Community" or "Young Children's Community") serves children who are comfortably walking (approximately age fourteen months) to age three, in a small and intimate group of twelve children and two trained staff persons. It has two program options, either half- or full-day. The environment conforms to the physical needs of the children, both in the size of the furnishings and in the opportunities for motor development. There is an observation area for adults, minimal furniture, tiled floors, maximum natural light, selected art placed low on the walls, and defined spaces to challenge coordination of movement.

The Montessori Preschool Program (ages 3-6)

The Montessori preschool classroom, or Children's House, is a "living room" for children. Children choose their work from among self-correcting materials displayed on open shelves, and they work in specific work areas. Over a period of time, the children develop into a "normalized community," working with high concentration and few interruptions. *Normalization* is the process whereby a child moves from being undisciplined to self-disciplined, from disordered to ordered, from distracted to focused, through work in the environment. The process occurs though repeated work with materials that captivate the child's attention. For some children this inner change may take place quite suddenly, leading to deep concentration. In the Montessori

See Chapter 11 for more information on normalization.

preschool, academic competency is a means to an end, and the manipulatives are viewed as "materials for development."

In the Montessori preschool, five distinct areas constitute the prepared environment:

- *Practical life* enhances the development of hand-eye coordination, gross motor control, and cognitive order through care of self, care of the environment, development of social relations, and coordination of physical movement.
- The *sensorial* area enables the child to order, classify, and describe sensory impressions in relation to length, width, temperature, mass, color, pitch, etc.
- *Mathematics* makes use of manipulative materials to enable the child to internalize concepts of number, symbol, sequence, operations, and memorization of basic facts.
- *Language arts* includes oral language development, written expression, reading, the study of grammar, creative dramatics, and children's literature. Basic skills in writing and reading are developed through the use of sandpaper letters, alphabet cut-outs, and various presentations, allowing children to link sounds and letter symbols effortlessly and to express their thoughts through writing.
- *Cultural activities* expose the child to basics in geography, history, life sciences, and earth sciences. Music, art, and movement education are part of the integrated cultural curriculum.

The preschool environment unifies the social, physical, and intellectual functioning of the child. Its important function is to provide children with an early and general foundation that includes a positive attitude toward school, inner security and a sense of order, pride in the physical environment, abiding curiosity, a habit of concentration, habits of initiative and persistence, the ability to make decisions, self-discipline, and a sense of responsibility to other members of the class, school, and community. This foundation will enable them to acquire more specialized knowledge and skills throughout their school career.

See the FYI articles by Laura Morris in this chapter and by Lili Peller in Chapter 5.

ALL-DAY MONTESSORI

The phrase "all-day Montessori" is an attempt to show the difference between a Montessori approach and what is commonly thought of as "day care." It refers to one (usually ages 3-6) classroom of Montessori children who stay all day, from early in the morning until early evening. The "all-day space" may have a full Montessori prepared environment (about 1,000 square feet), a second space for naps (500 square feet), informal living and large motor activity space, and a developed outdoor environment including a garden.

"All-day Montessori" directly contrasts the "before- and after-school" approach, which tends to place children from different classes into a multi-purpose space with a few toys, entirely separate from the Montessori prepared environment.

The all-day environment should incorporate the following principles:

- The numbers for an all-day community should be kept on the smaller side, around 25 children.
- Emphasis in the morning should be easing into the day at a human pace, with children choosing their work gradually.
- Children should participate in all aspects of meal preparation and serving.
- Children should have the option to do practical life throughout the day, reflecting real work to be done indoors and outdoors. Walks and play outdoors should also be available throughout the day as part of the individual choices of the children.
- Special occasions, such as lunch and tea, become good practice for exercises of grace and courtesy and for extended socialization.

Accommodating the needs of children who come very early as well as those who stay very late can lead to an overly long day for one Montessori-trained adult. Some programs use two Montessori-trained adults, one working an early-day schedule and one a later-day schedule, with some overlap, to ensure that a Montessori-trained adult is available at all times (see Figure 2). This strategy sacrifices the continuity of having only one Montessori-trained adult for one group of children, but it does ensure that children can choose to work with the Montessori materials at any time of day. Other all-day programs use one Montessorian, with paraprofessionals filling in the very early and very late hours (see Figure 3). This solution ensures continuity of the Montessori adult, but it limits children's work choices for part of the day. Still other schools choose to limit the hours of the program's availability to those that can reasonably be worked by one Montessori-trained adult (this approach is described in the articles by Mary Verschuur under All-Day Montessori in this chapter's Further Reading from NAMTA).

A year-round program has to factor in staff vacation time, as well as professional development leave policies, when budgeting and scheduling staffing. An issue particular to all-day programs is the retention of support staff. Montessori schools find themselves contending with all of the problems inherent in "care" (day or child or elder) facilities: affordability, adequate pay scales, training costs, hours of operation, etc., in a society that does not place a high monetary value on nurturing roles.

In contrast with classroom half-day and extended-day programs, all-day Montessori entails a more homelike setting, with a real sense of community that occurs when children really live together within one group that stays all day. Children are challenged to do work with a greater range of choice and fewer pressures of time, including the opportunity for two full work cycles. The all-day Montessori program takes advantage of longer hours, allowing the child to exist at a natural pace very close to that of the home environment.

Day care licensing requirements have very specific regulations about space and daily procedures, so they need to be consulted from the outset.

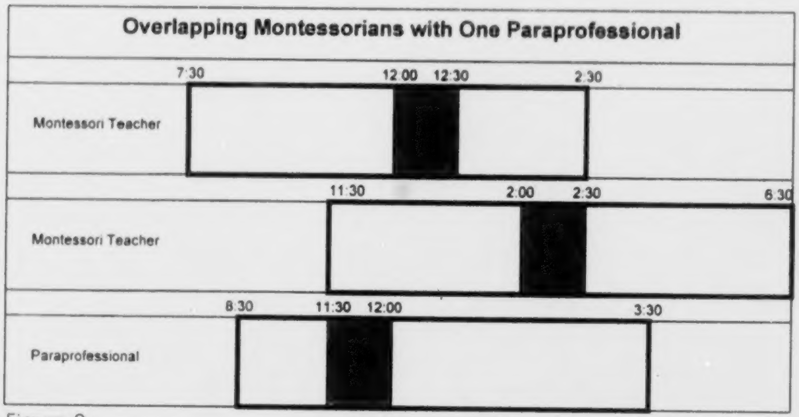

Overlapping Montessorians with One Paraprofessional
Montessori Teacher
7:30
12:00
12:30
2:30
Montessori Teacher
11:30
2:00
2:30
6:30
Paraprofessional
8:30
11:30
12:00
3:30

Figure 2.

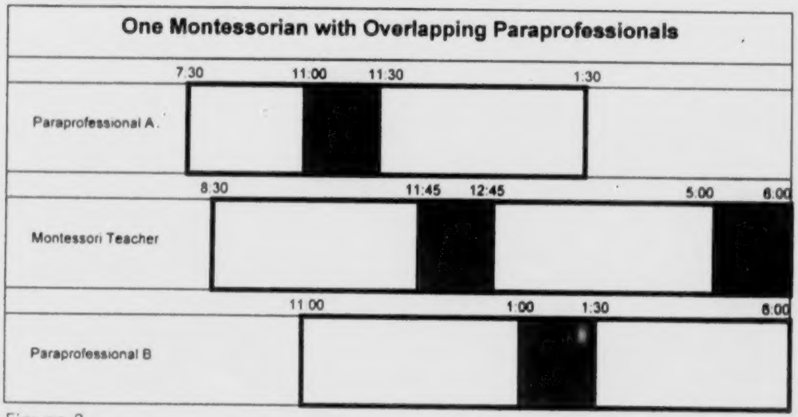

One Montessorian with Overlapping Paraprofessionals
Paraprofessional A
7:30
11:00
11:30
1:30
Montessori Teacher
8:30
11:45
12:45
5:00
6:00
Paraprofessional B
11:00
1:00
1:30
6:00

Figure 3.

The Montessori Elementary Program (ages 6-9 and 9-12)

The elementary program offers a continuum built on the preschool experience. As in the preschool, the Montessori materials are a means to an end. They are intended to evoke the imagination, to aid abstraction, to generate a world view about the human task and purpose. The child works within a philosophical system, asking questions about the origins of the universe, the nature of life, people and their differences, and so on. On a factual basis, interdisciplinary studies combine geological, biological, and anthropological science in the study of natural history and world ecology. The environment reflects a new stage of development and offers the following:

- Integration of the arts, sciences, geography, history, and language that evokes the natural imagination and abstraction of the elementary child.
- Presentation of knowledge as part of a large-scale narrative that reveals the origins of the earth, life, human communities, and modern history, always in the context of the wholeness of life. Presentation of the formal scientific language of zoology, botany, anthropology, geography, geology, etc., exposing the child to accurate, organized information and respecting the child's intelligence and interests.
- Connective narratives that provide an inspiring overview as the organizing, integrating "Great Lessons." Great Lessons span the history of the universe from the big bang theory of the origin of the solar system, earth, and life forms to the emergence of human cultures and the rise of civilization. Aided by impressionistic charts and timelines, the child's study of detail in reference to the Great Lessons leads to awe and respect for the totality of knowledge.
- The use of timelines, pictures, charts, and other visual aids to provide a linguistic and visual overview of the first principles of each discipline.
- A mathematics curriculum presented with concrete materials that simultaneously reveal arithmetic, geometric, and algebraic correlations. This curriculum recognizes the child's need for experience, for repetition, for various levels of concreteness, for going from concrete to symbol to abstraction. The emphasis is on making formulae and rules a point of arrival and discovery, not a point of departure.
- An emphasis on creative writing, expository writing, interpretive reading of literature, research with primary sources, grammar and sentence analysis, spelling based on cultural studies and usage, and oral expression for both sharing research and dramatic productions.
- Montessori-trained adults who are "enlightened generalists"–teachers who are able to integrate the teaching of all subjects, not as isolated disciplines, but as part of a whole intellectual tradition.
- Emphasis on open-ended research that is student-generated and teacher-guided. Students are encouraged to wonder, to carry out research, to experiment, to develop knowledge, to make observations, to demonstrate skills. This in-depth study uses primary and

secondary sources as well as other materials. Textbooks and worksheets, if present at all, are used by the children as reference materials, not as a basis for assigned or ongoing work.

- "Going out" to make use of community resources beyond the four walls of the classroom.

Studies are integrated not only in terms of subject matter but in terms of moral learning as well, resulting in appreciation and respect for life, moral empathy, and a fundamental belief in progress, the contribution of the individual, the universality of the human condition, and the meaning of true justice.

The Montessori Adolescent Program

Unlike the other Montessori age levels, there is at present no international consensus defining Montessori secondary education. Maria Montessori's vision of a residential farm school for ages 12 to 18 has yet to be realized (see "The Erdkinder Vision" in this chapter's FYI articles). What follows is a composite of the programs of several existing school-based Montessori middle schools (usually ages 12-15).

Middle school ushers in a new level of independence that must be provided for in the Montessori environment by increasing activity from the point of view of work level, choices, and planning. In the middle school, the Great Lessons, timelines, and charts are replaced with overviews of general sequences of learning for which the student becomes responsible in the context of an integrated whole. Within this overview, the student has open time to collaborate on both self-initiated and instructor-initiated projects. Open time allows for individualized instruction, a natural pace for absorption of material presented for both mastery and emotional understanding, unlimited depth of pursuit based on student interest, and ample time to study art, science, music, business, and other topics students choose.

The general premise for the adolescent program is that it must bring into consciousness the moral and world view of the elementary years. Philosophical ideas related to natural and cultural history now come into play. Great Lessons evolve into great ideas derived from a serious approach to the humanities. For example, "life, liberty, and the pursuit of happiness" may be tied to a specific area of American history, but this ideal also has a life in the history of philosophy and literature.

Consistent with the moral relationships stressed in the elementary program, the adolescent can make great cognitive leaps while integrating ideas and values in conjunction with current events, home life, or community activities.

Service programs such as working in a soup kitchen, farming as a community venture, and apprenticeships or mentorships in the workplace are part of an advancing "going out" that gives the adolescent a combined vocational and liberal arts curriculum with a particular emphasis on economic enterprise.

Adolescent programs characteristically have discrete spaces for specialized activities: photo lab, science lab, stage, art room, and lesson rooms all adjacent to open space that unifies the side rooms.

The following curriculum areas are offered in a school-based Montessori middle school:

- *Social sciences, science, and geography:* The student integrates history, utilizing themes from earlier studies in natural and cultural history, including interdependency, evolution, life cycles, matter and energy, behavior and culture, mental health, physical health, agriculture, government, manufacturing, communication, world systems, earth preservation, and so on, in the context of social responsibility and governance. Primary readings from each historical period are emphasized.
- *Language arts:* The student develops confidence in self-expression utilizing the seminar, oral presentation, debates, drama, video, photography, essays, play-writing, poetry, and short stories, and explores related accounts of historical and philosophical material through literature, utilizing components of style, genre, characterization, interpretation, and the art of discussion.
- *Second language and grammar:* The student learns a second language through the conversational approach while also revisiting grammar. The study of grammar in relation to the second language prompts a review of complex sentence structure in English.
- *Mathematics:* The student uses higher-order thinking skills to solve problems in relation to a variety of challenges, from practical money transactions to algebraic relationships and explores numbers, properties, simple equations, higher measurement, computer calculation and graphics, geometric proofs, and algebraic equations.
- *Practical management:* The student manages reality-based operations in economic and social enterprises, including yearbook, school newspaper, student social events, agriculture, fundraising, travel, volunteerism and service, apprenticeship, and computer programming.
- *Fine arts:* The student utilizes a discipline-based arts education plan that presents individual artistic areas of painting, acting, singing, composing, photography, dance, and sculpture, and includes a general education for aesthetic literacy, integrating the arts with other academic endeavors.
- *Farming (optional):* The student engages in elements of farming as an economic enterprise through care of plants and animals, maintenance of simple machines, understanding of land use, and operations of accounting, sales, personnel records, and working relations in ongoing projects.

Frequently Asked Questions

When and why should a school begin an elementary expansion program?

The most natural program expansion is from preschool to elementary. When a Montessori preschool experience plays a positive and successful role in a child's growing up, parents are very likely to request a Montessori elementary education opportunity. Montessori children, with their advanced work in math and reading, usually need the stimulus of a dynamic cultural curriculum at the first-grade level. If a majority of families are expressing an interest in the elementary that is the right time for action. First steps in this direction would be for the board to visit another elementary site, to read Paula Lillard's *Montessori Today*, where the elementary is discussed in the context of the preschool, and to invite Montessori-trained elementary teachers to the school to discuss their work and the track record of the Montessori elementary program. NAMTA also provides excellent promotional videos and publications for starting an elementary program.

Montessori Today, by Paula Polk Lillard (1996, Random House), is available from NAMTA. See the NAMTA catalog or Web site <www.montessori-namta.org> for current price and shipping information.

When a preschool adds an elementary program, there are many positive results: Parents increase their support of the school; the community recognizes the school's enhanced profile; and there is a whole new school climate, which stimulates the preschool and enriches its Montessori identity because it is now preparing children for Montessori elementary instead of more traditional elementary programs.

How do schools decide when to add infant and adolescent programs?

Usually the infant and toddler programs are selected because the principal or head teacher is interested in exploring a new level (subplane) of education, or working parents are requesting an all-day program, or the school wishes to build a market base for the 3-6 program. Montessorians know that sensitive periods begin well before birth and that much can be said for Montessori under three if it is very high quality with well-chosen personnel. The stakes are high with these very young and impressionable children.

Adolescent programs are often propelled by parents who are very satisfied with the elementary program and want their sensitive early adolescents to continue in a Montessori setting that will meet high school standards while building values and character strength during this very formative time. The adolescent program (usually ages 12-15) really works when the upper elementary is secure in both academics and enrollment. Although an adolescent program usually helps the 9-12 program hold its students, this occurs only if the 9-12 program has already stabilized with at least 30 students.

See Chapter 3 for salary information

If a teacher or head of school wishes to initiate an adolescent program, then the board should make sure there is a real demand. Start-up capital costs for an adolescent program, excluding space costs, usually run around $35,000 to $50,000, depending on the size of the program. This figure includes furniture and fixtures, science equipment, a library of literature and reference materials, computers, advanced music and art equipment and supplies, and specialty equipment such as a sewing machine and table saw. A good head teacher usually costs a little more than at the elementary level because of the enormous pioneering and preparation tasks involved.

When I order materials, do I order the entire recommended list?

See Appendices 1-3 for materials lists at the infant-toddler, preschool, and elementary levels.

Generally, it is best for a Montessori-trained teacher to make the appropriate order; hopefully, the teacher who places the order is the teacher who will be using the materials. A new teacher may need help from a more experienced teacher in discerning what are the most essential materials if a school cannot afford the complete array of Montessori materials. The recommended list represents the standard of the profession, but each teacher can give advice on what is essential to his or her training and performance as a teacher.

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The Montessori Infant Program

by Judi Orion

This is a brief overview of the Parent-Infant Class, Nido, and Infant Community. These programs are increasingly being introduced into schools, especially in the context of all-day Montessori. Since child care at these early stages is so critical, its is important to acknowledge the expertise of the Assistants to Infancy training program in specifically training adults to work with children under three.

The Parent-Infant Class

The Parent-Infant Class consists of not more than ten babies, each with a parent, nanny, grandparent, or primary caregiver.[1] The class meets weekly for a 2- to 2½-hour morning session that everyone attends and a 2-hour discussion during the afternoon (without babies). The environment is prepared according to the developmental needs of the babies in the group. The Montessori-trained Assistant to Infancy interacts with the babies and their mothers and serves as a role model of how to "work" with infants. As the babies begin to slowly detach from their mothers, the mothers are taught how to observe their babies and–for a brief period of time–to see them in a more objective light. Mothers are often astonished at what their babies are capable of doing. Their babies' subtle communication signals are pointed out if they haven't already tuned in to them, and they are shown how to observe what their babies do in order to know what materials to offer to them.

Weaning and the introduction of solid food is handled during these sessions and introductory food is often cooked when a baby or mother is ready for that transition.

The discussion groups have two components: One is a presentation made by the Assistant to Infancy on some aspect of their work, such as introducing solid food, toilet training, biting, language and movement development, crying babies, clothes, etc.; the second component is whatever the mothers want or need to discuss.

Some parents are passive recipients of the information while others are very actively involved in discussing the issues. Information is shared among the mothers regarding many different aspects of their new roles. Sibling rivalry, biting, and sharing toys are often favorite topics, as well as what happens to the relationship between the two parents once a new member arrives or how the family dynamics change when going from one child to two or three. The potential topics are limitless.

This type of session is very productive as a marketing device for schools, especially schools that cater to a population in which one parent is able to stay home with the children. It serves a need for the isolated parent, it gives the baby a chance to interact with other babies, and it serves as an information source regarding the Montessori approach to the youngest children.

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[1] For the sake of simplicity, this adult will be referred to as the baby's mother, since the mother is usually the adult who attends the Parent-Infant Class.

The Nido

The Nido (Italian for "nest") consists of nine babies from two months to twelve to fifteen months (when the child is walking well). With three adults, a three-to-one ratio is maintained at all times. This is lower than the licensing requirements of most states: Many states have a five-to-one, some a four-to-one ratio.

The environment is divided into four main areas:

1. The *movement area* is equipped with a thin covered mattress with kiosks and bars the babies use for pulling up. There may be other mattresses around the room, depending on the space available. The movement area usually includes a stair as well. This area needs to be spacious to allow movement possibilities.
2. The *sleeping area* is an isolated area with individual futons. This area provides a quiet place for the babies to sleep whenever they need to, but has easy access to the rest of the environment so that when a baby awakens he or she can crawl or walk to the adults. The children are free to go onto their futons when they are sleepy and come off when they awaken. This area also includes a comfortable adult chair for nursing mothers or for bottle feeding.
3. The *eating area* is equipped with low, heavy "weaning" tables, a communal dining table, and low, heavy "weaning" chairs, instead of highchairs. The children are capable of getting into and out of the chairs with ease. The adults sit on low stools facing the children when feeding them. This area is not carpeted. The children are encouraged to feed themselves as soon as possible but are never left to eat alone as eating is a "social occasion." An area is provided for nursing mothers to come to nurse their babies, and several adult areas are available for giving bottles to those babies who take them.
4. The area for *physical care* (changing, bathing) is located next to a water source (usually a licensing requirement) and is convenient for the adults to use. Nearby is a low stool or bench for use with children who are learning to change their own panties. We recommend that children in this environment wear panties instead of diapers as they move better and become more aware of their bodily functions than do children in diapers. If possible, a small, low, square bathtub is located nearby.

Elsewhere in the environment there should be a rocking chair for comforting babies. Most of the room should be tiled, not carpeted, except for the sleeping area. The Nido environment has no walkers, swings, playpens, cribs, highchairs–none of these devices sold to "aid" a baby's movement. Babies are placed on the floor and move everywhere by themselves.

With babies spending most of their time on the floor, it is crucial that the floor be disinfected nightly and that all adults working in the environment keep special shoes just for use in the Nido environment. All adults (including parents) entering the environment must either remove or put covers over their shoes to avoid tracking in outside dirt. The environment must be spotless.

Adults in the Nido environment wear a "uniform" that is washable, comfortable to work in, and attractive. Babies in this environment learn quickly that the "uniform" signifies someone who will respond to their needs. Generally one adult has the care of three of the babies and is responsible for the feeding, changing, and nurturing of those three babies. This way the babies relate to one adult for their primary care, though all the adults should be responsive to all the children.

There is no "program," so to speak, in the Nido. The children spend their time as they would at home–sleeping, being awake and interacting with adults and other children, using the materials provided for their development, moving about the environment, going outside either into the garden or on a walk, eating, bathing, etc.

This can be a very stressful working situation if the group size is much larger than nine or if the adult-to-child ratio is higher than three to one. With babies given the kind of freedom we recommend–not caged up in playpens, etc.–it is inhumane to have more than nine babies or a higher ratio. This makes for a very expensive program, however, and this factor should be taken into consideration when planning to offer this kind of care.

The Infant Community

The Infant Community consists of ten to twelve children from 14 to 15 months (walking well) to 2½ to 3 years of age. Staff consists of two adults, one trained and one assistant (1:6 ratio). In an all-day situation, a third adult is needed to help with lunch, naps, and breaks.

There are two program options: a 3-hour, 5-day-per-week program, or a program where the child is in the environment for 8 to 10 hours per day, 5 days per week, 11½ months per year.

The daily program for the children consists of individual work time; group time for singing, reading, dancing, being together; outdoor time; and eating, whether lunch or snack.

When each of these segments occurs depends upon the children–some days begin outdoors, some end outdoors, some do both. Eating tends to be scheduled, as most of us adjust to eating schedules rather quickly.

The individual work time finds the children involved in activities that include the use of language enrichment materials (i.e., objects, cards–basically nomenclature materials); eye-hand coordination materials (many varied kinds, including sewing and gluing), and practical life materials that should serve as the main body of work. Language and coordination activities can be included easily in anything having to do with caring for one's environment or oneself, or preparing, serving, and cleaning up one's food. It is not unusual to see someone making bread, someone washing napkins, and someone arranging flowers.

The group times tend to evolve: The adult may sit with one or two children to read or sing and other children will gather, resulting in all or almost all of the children being in a group. Eating is always a group activity. Children should never be forced to come to a group situation–as in the Primary (ages 3-6) class, the group is an invitational affair. If what is going on is interesting enough, the children will come.

The Infant Community is kept small, intimate, and flexible with regard to planned activities so that the needs of the children are adhered to at all times rather than a plan created by the adults.

There should be a feeling of joy in this environment as these young children are given freedom. They are not given license to do whatever they want, but they are given freedom within a structure that caters to their developmental needs.

Through the 350 hours of required observation during the Assistants to Infancy training, the adults learn to look at a child's behavior and intuit what the "real" issues are–not in terms of "psyching the child out" but in terms of reading those subtle, non-verbal messages.

Some children this age come into the environment frustrated because their home environment is not really set up for them to do anything or the adults don't think they are capable of doing anything. These children go through a period of testing, but given unconditional love, most of them generally settle into a contented participation in the environment. The environment should be so beautiful that it actually entices them into work, which will allow many of the deviations to drop off.

Toileting is usually a big issue with children this age. We simply put all of them into panties until they are toilet trained. When the children stop wetting their pants, it means they have accepted at a deep level the responsibility for their own body and its functions. This approach often brings up a lot of issues with the parents. If we tell them we are going to "toilet train" their child, some are glad but some think we are pushing. We aren't really "toilet training"; we simply set up the environment in such a way that when a child becomes aware of those functions, handling them is made easier. No rewards or punishments are used because using the bathroom is a very normal function that all people carry out. If a child urinates or defecates in his or her panties, help is simply given to clean up, and clean panties are put on.

The empathy shown from child to child in this type of group is very touching; children are extremely empathetic when someone cries–even to the point of sometimes joining the crying, or sometimes just making a sad face. But the joy is also contagious.

The adult with the group needs to have either maintained or recaptured the ability to rejoice in all the little discoveries that children make at this age–i.e., that every apricot has a pit or that the sun can make rainbows or that the wind feels wonderful in your face or that walking in the rain is delightful. This is not to say that the adult must abandon the child in order to be childlike, but that the adult can truly understand and appreciate every child's joy and excitement in what may be to us the mundane aspects of life. It's important to begin every day as one that has never been lived before.

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Northwoods Montessori Full-Day Program

by Laura Morris

Laura Morris honestly describes the trial-and-error approach of the Northwoods Montessori School's planned experiment in all-day Montessori. Her exploration of all-day care in comparison to her previous experience with the half-day model provides insight into the universal transition that must be made at every school that takes on the challenge of all-day Montessori.

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Northwoods Montessori is an urban school in Atlanta, Georgia. The school is entering its 25th year. Through the years the school has grown and changed with the community around it. Our most recent opportunity for growth was the need to add a fifth primary (3-6) class. When we looked at this need, we also had to consider what this entailed for our add-on care, that is, the environment the primary children would go to when not in the traditional Montessori classroom. Our added-day class was full, and we knew that many in the new class would need add-on care.

At the time, we had what I have come to refer to as the standard American model of Montessori with add-on care. This environment is lovely. We have an AMI-trained teacher who helps to keep the continuity of the Montessori program in the added-day class. In this environment, we have a variety of activities: a full practical life area, an art area, games, and toys. Although we felt the add-on program was run very well, we wanted to take this opportunity to examine the full-day approach. We wanted to consider all options and look for the approach that would best meet the child's needs.

Our long-range planning committee developed a task force to study full-day programs. The task force was comprised of all the primary faculty, the Director of Education, and any of the elementary faculty who had an interest. This was a two-year endeavor that began at the Orlando NAMTA conference on all-day Montessori (March, 1993). We read a great deal. Two of the books we found most helpful were Dr. Montessori's *The Advanced Montessori Method* and E.M. Standing's biography, *Maria Montessori: Her Life and Work*. We observed schools that had working models. We conducted phone interviews with those schools we could not visit. And we observed and evaluated our own program. The details of our findings led us to the consensus that we would experiment with a new model of a full-day class. This preparation was critical; having support from the faculty is essential to the long-range success of this program.

The main objective of this article is to share my journey as a primary teacher who is experimenting with a full-day program. I had worked a number of years in a traditional Montessori classroom. There I experienced the mid-day exodus of the younger children and the end of my class day at 3:00. I also had taught for one year in the added-day class. It was here that I truly came to appreciate what those transitions meant to the children (see Figure 1). No matter how consistent I was, no matter how well prepared the environment, the results were the same. The children were being moved about by externally imposed transitions; their sense of order and their need for belonging were not fully realized. Dr. Montessori observed that the child's love of order and consistency is based on a vital need for a precise and determined environment. We were asking the child whose need for order is the greatest to make the most changes. It was this experience in the added-day environment that made me aware and willing to pursue the full-day program.

The fact that I saw the need for a full day did not mean I went into it without concerns. The first concern was whether we were encouraging parents to leave their children for longer periods of time by offering a full-day program. Our long-range planning committee had found that our

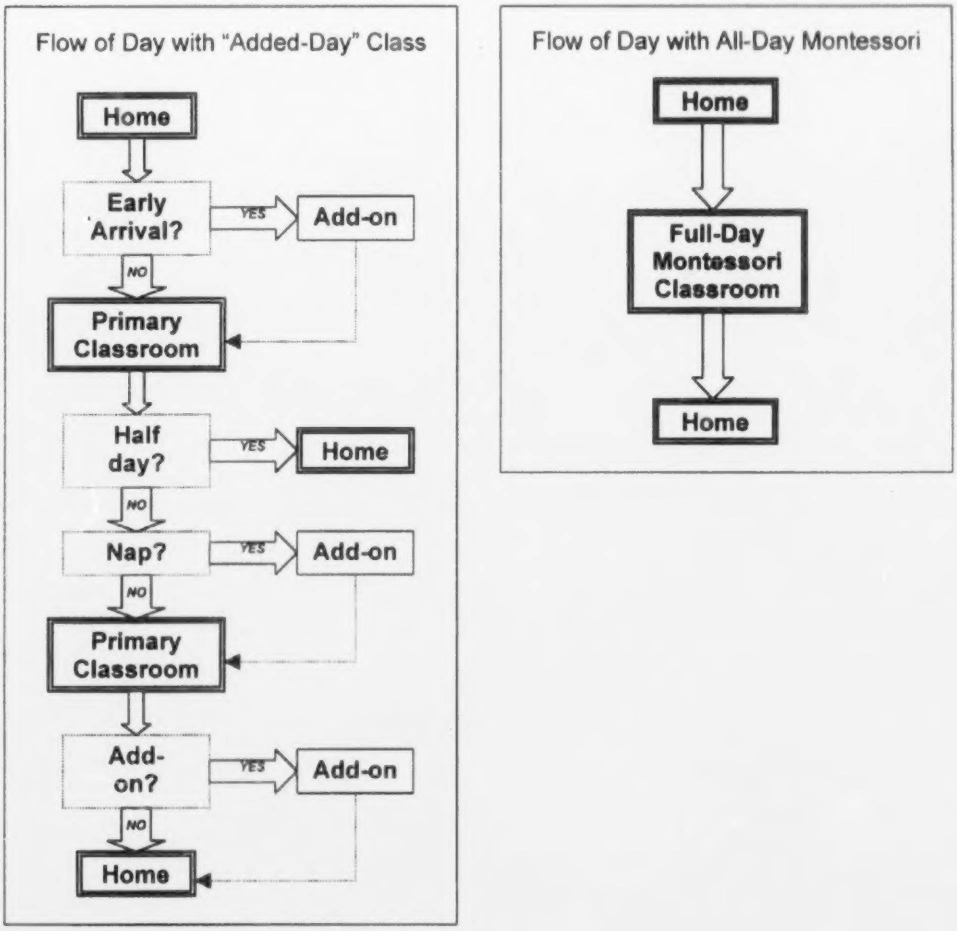
Flow of Day with "Added-Day" Class
Home
Early Arrival?
YES
Add-on
NO
Primary Classroom
Half day?
YES
Home
NO
Nap?
YES
Add-on
NO
Primary Classroom
Add-on?
YES
Add-on
NO
Home
Flow of Day with All-Day Montessori
Home
Full-Day Montessori Classroom
Home

Figure 1.

community's need for full-day care had grown and would continue to grow. We have a large number of two-income families and many single-parent families whose need for a full day is based not on desire but on necessity. These children will go to some environment other than their home after 3:00, whether we provide it our not. Therefore, it seemed in the best interest of the child to provide as consistent an environment as possible, so that the child's sense of security, belonging, and order could be nurtured.

Next I questioned how to keep the integrity of the Montessori classroom yet provide opportunities for the child that did not involve formal Montessori materials. A child who lives in an environment for up to 10½ hours a day needs the opportunity to work and to play. What kind of play is appropriate, and when should it be available? Is play/imagination appropriate at all?

Two passages from *The Advanced Montessori Method* helped me with this question. The first was this: "When imagination starts from contact with reality, thought begins to construct works by means of which the world becomes transformed: the power to create."[1] Play based on reality–what would that look like? I have been inspired by the children to bring in some imaginative lessons. One example is a dinosaur work. The lesson is given in the form of a story: "A long time ago, before people lived on the earth, there lived dinosaurs. How do we know about them if they don't live today? Because of their bones that have been found by paleontologists." We name the kinds of dinosaurs we have represented in our work. We talk about which ones are carnivores, which are herbivores, etc. When I observe the children doing this work I hear them using the language from the story. Giving the children the opportunity to use these words in context helps them to internalize them and gives them another level of understanding. I have yet to see the dinosaurs turn into Ninja dinosaurs or be used in a manner that is inappropriate.

The other passage is this: "The mind that works by itself, independently of truth, works in a void."[2] This helped me to understand why certain materials seemed to be misused. I used this passage to help me remove those toys that were not being used in a purposeful way. For a while we had a housekeeping corner in which the children could pretend to be mom and dad. I have since taken it out. My reasoning is that the children are given practical, real opportunities to care for themselves and their environment with the practical life work in the class. They don't need to pretend to care for dolls–we have situations arise every day in which children care for one another. The children help one another by cleaning up spills, by tying shoes, and by giving lessons. One activity in this vein that I have added is an opportunity to dress up. When studying another country, we will have a snack that is representative of the country, and the children can dress up in native costume to eat the snack. For example, when we were focusing on Germany, we had bratwurst and the children wore lederhosen.

I resolved for myself the issue of what constituted appropriate additions to the full-day class, but not when these additions should be available. In the beginning, I made those materials that were not formal Montessori materials off limits until after 3:00. This, I feel, was a mis-

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[1] Montessori, Maria. *The Advanced Montessori Method, vol. 1: Spontaneous Activity in Education.* 1917. New York: Schocken, 1965, p. 241.

[2] Ibid., p. 242.

guided attempt to keep the integrity of the Montessori classroom. What I observed was that the children coveted these materials, wondering when it would be 3:00. It took about three months for me to realize that it was my limitation of these materials that made them so attractive. When I eliminated the time restraints, these non-formal materials became extensions to the class and their use was no longer an issue.

Another concern was the flow of the day. The staffing design we chose (see Figure 2) was one of many we considered. It was chosen because it provided the greatest consistency for the children and I was willing to add one hour to my day. For the children we developed a cycle that provided two long periods of uninterrupted work (see Figure 3). The early-arrival children come into the classroom with the paraprofessional. There are usually only a few children who need this. They help set up the class, putting water into pitchers, wetting sponges, etc. Then they choose any work on which they have had a lesson. I enter the class with the majority of the children at 8:30, and we begin work as we arrive.

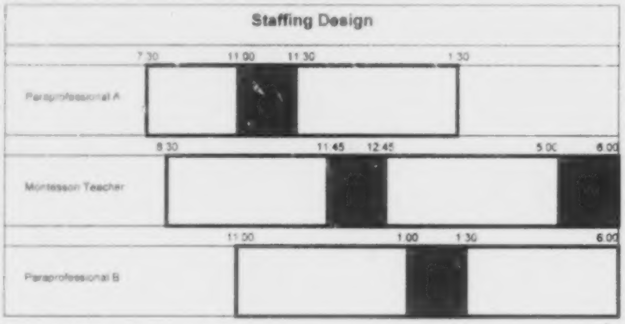

Figure 2.

Sketch of the Daily Cycle	
7:30 a.m.	Early Arrival
[illegible]	
11:30 a.m.	Playground
12:00 noon	Lunch
12:45 p.m.	Quiet Relaxation
[illegible]	
4:30 p.m.	Playground (flexible timing)
5:30-6:00 p.m.	Late Departure—Care of Environment

Figure 3.

We lunch and nap mid-day. Everyone rests, the older children separate from the younger. We added sufficient space to the classroom to accommodate a separate nap space for the younger children. The older children rest while I read aloud. The younger children listen to music and have their backs rubbed. Those who do not fall asleep get up and join the afternoon work cycle. As the children wake from their naps, they put away their bedding and join in the afternoon work cycle. In the afternoon, the parents begin to pick up from 4:00 on. We have provided a comfortable sitting area for the parents, where we have them wait while their child puts away his or her work. This has worked very well for us, but educating parents on this routine at our first parent meeting was important. I was concerned that having the parents in the classroom would be disruptive, but I didn't have an alternative. I have been pleasantly surprised by the respect the parents have shown when entering the classroom. They love watching their children complete their work.

I leave at 5:00 most days, while the afternoon paraprofessional continues with a small group outside. They come in from the playground at around 5:30 and get the room set for the next day. I had some concern that allowing the younger children to join us as they awoke would interfere with the extended-day work and that the academics might suffer. I have found the opposite to be true. The level of work in this environment surpasses that of the other classes I have taught. The children have greater exposure to the work because of the length of their day. I feel less pressure in that there is plenty of time to give the lessons. I no longer wait until the afternoon to give challenging lessons. Moreover, the younger children are intrigued by the challenging lessons they see.

The most important change we made to the physical space of the full-day classroom was the addition of a fenced-in garden area. This space is not very large, but it allows the children access to the outdoors at any time. We use this space all year long for work, play, and as a place to become rejuvenated. On any given day you can see children raking leaves, reading books, or walking on the line in the garden. We have made many discoveries in our garden and developed many extensions to our classroom work. The garden offers practical life and sensorial opportunities such as sweeping the stepping stones and smelling herbs.

This full-day program is a work in progress. I am constantly evaluating the class and looking for ways to enhance the environment. I find this environment to be the most peaceful and joyful in my Montessori career. There is a great sense of community among the children in this class, and this has extended to their families. I have experienced for the first time the scent of the perfume E.M. Standing refers to when he says,

> The crowning characteristic of a group of normalized children is joy. It pervades the little community like a perfume. ... This joy which shines in the children's faces, and indeed in their whole demeanor, is something more than pleasure or the happiness of being entertained. ... It is, in fact, the joy that nature always grants as the accompaniment to the right use of our faculties. ... the joy which comes with acting in obedience to the laws of our nature.[1]

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[1] Standing, E.M. *Maria Montessori: Her Life and Work.* 1957. New York: New American Library, 1984, p. 178.

The Erdkinder Vision

The Erdkinder is a program being born; it is not in existence, but is being envisioned. This vision statement was written by David Kahn for The Montessori Farm School, near Cleveland, OH. The intention of the vision statement was to formulate in brief terms Montessori's complete vision of Erdkinder, to be implemented over time at the Farm School. Both the "practical considerations" and the "educational syllabus" presented in Montessori's now-famous appendices to From Childhood to Adolescence *are summarized here.*

Maria Montessori articulated her vision for the adolescent (ages 12-18) in Appendices A and B of *From Childhood to Adolescence.*[1] Montessori divided the program into two aspects: the practical work emanating from the farm, store, and bed-and-breakfast; and the educational studies connecting farm experiences to independent studies that fit into a general academic syllabus.

Within the Montessori community there is a strong desire to see Erdkinder done according to Maria Montessori's vision, as presented in detail in her writings, for the following reasons:

1. The farm is an optimal place for 12- to 15-year-olds to unlock their potential as self-motivated, independent, and fulfilled young workers in a wider context than school.
2. The Erdkinder plan of studies and work precisely actualizes what the students have explored at the preschool and elementary levels, focusing on the story of human interdependency with the natural world.
3. Through practical life and cooperation with the land, academic work is integrated by the natural community demands emerging from the farm and its history. These integrative themes follow along the lines of study originated with Cosmic Education, suggesting a philosophical understanding of human progress and technology as compatible with the earth's balance and sustainable future. This level of integration of study and work cannot be achieved on such a broad scale in a school-based middle school program.
4. The Erdkinder vision clarifies Montessori principles and reintroduces the Montessori design into the adolescent literature, taking one more step in the direction of consensus about adolescent design for Montessori children.

A. Practical Considerations

The work at the Erdkinder is divided into practical areas, each of which can be subdivided into a variety of occupations. Here is a brief list of areas suggested by Dr. Montessori:

Museum of Machines. Historic machines would be available either for applications in daily living or to take apart and explore for their basic principles of mechanics. These machines can include butter churns, hand tools, cider presses, a wringer washing machine, lanterns, an ice cream maker, etc.

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[1] Montessori, Maria. *From Childhood to Adolescence.* 1948. Rev. ed. Oxford, England: Clio Press, 1996, pp. 59-81

Store for Sale of Produce or Crops. A produce stand on the property or a nearby farmer's market would provide a retail outlet for farm produce and crafts. Retail occupations include business math, computerized bookkeeping, inventory of supplies, marketing, community relations, small vendor applications, newsletter, food preparation, and an understanding of employment conditions.

Dormitory for Residential Program. The adolescents would organize their sleeping space and prepare their meals in cooperation with an adult. Living together for a period of time fosters new sensitivity to classmates in terms of their living habits and levels of independence and interdependence. The dormitory would have approximately six bedrooms with four beds in each room, a kitchen and eating area, and common showers and washrooms combined.

Technical Instructors. The Erdkinder would import volunteer specialists of all kinds, including craftspeople, farmers, astronomers, businesspeople, furniture makers, farmers, automotive mechanics, instrumentalists, naturalists, geologists, entomologists, journalists, poets, artists, government officials, cartoonists–a variety of occupational specialists who can inspire new interest simply because they are immersed in their areas of expertise.

Building Construction and Repair. Buildings on the property would need constant maintenance and repair, which in some cases can be done with the help of the adolescents. In addition, young people could assist in the construction of small animal shelters and greenhouse structures.

Organic Farming Including Flower Gardening. The farming program would include envisioning and planning the garden, agricultural craft, observation, crop rotation, composting, tillage, soil fertility, seeding, transplanting, soil cultivation, harvesting, marketing and market strategy, year-round farming, using garden tools, etc.

Commerce and Exchange. Fundamental to adolescence is the social development of mercantile enterprise that results from serious entry into the marketplace. The economic program would include understanding of the cyclic nature of a business, including annual reports, profit sharing, funds management, etc.

The Adult Guest Facility (Bed-and-Breakfast). A discrete part of the student dorm would be two "adult" bedrooms with private baths to provide an occasion for the adolescents to serve and take care of their families and other visiting adults. These bedrooms may also include a small breakfast nook and should be in a space away from the student space, with a nice view.

The Activities Center. This would include a work space for the arts, computers, library, crafts, photo darkroom, and video lab.

B. The Educational Syllabus

History is certainly the hub of all knowledge; the story of life on earth incorporates the sciences and the humanities, especially philosophy, the history of ideas, and the history of theology. History leads to the building of a new world view. The rationale for the educational syllabus is a continuation of the elementary cosmic view, but the approach to learning is based on the adolescent's occupations, experiences, and responsibilities on the farm.

With enough practice, the adolescent would be able to transfer occupational experience to academic pursuits, which in turn would universalize the occupation. The adolescent builds out of the farm experience formal learning through writing, research, artistic and cooperative ventures, and reading in the following areas:

1. Self-Expression

Self-expression includes artistic occupations open to choice as part of the work of the day. Montessori suggests that some work would be cooperative and other work would be individual involving "artistic and linguistic ability and imagination including ... music ... language ... [and] art."[2] Musical performances with small ensembles and singing groups could grace the routines of the day; musical experiences can include those focused on folk instruments relating to life on the farm. For example, music appreciation could reflect African-American work songs as the basis for spiritual expression as well as the basis of blues, rock and roll, jazz, and modern rock. Language expressing the beauty of the farm in poetry or an essay about community justice in human relations would provide direct expression of the farm experience. Speech and elocution, the logical presentation of ideas, would be integral to the business of the farm. Art would add another dimension to externalizing the inner life of the adolescent and would include formal drawing and painting, photography, and a variety of crafts related to the aesthetic and practical needs of the garden, the bed-and-breakfast, the store, and the living space of the adolescents.

2. Formative Education in Relation to Psychic Development

In her "Educational Syllabus" for adolescents, Montessori highlighted three areas for character development:

Moral Education is first defined as "spiritual equilibrium" or a sense of balance "without which it is impossible to stand upright or to move into any other position."[3] The practical and living circumstance of the farm experience creates real moral and interpersonal challenges for which each adolescent is given a chance to express opinions and points of view in a common council. Montessori defines "moral care" as "the relation between the children, the teachers, and the environment."[1] Respect, as defined at all Montessori levels, is a way of seeing the "hidden" values and potential of the adolescent in relation to the future progress of society. "The adolescent must never be treated as a child,"[2] Montessori writes. The farm experience affords the adolescent a wider experience of roles, a wider choice of activities, but not without adult involvement and clear rules. Integral to psychological well-being is the "change-over" of occupations, finely timed to the inner clock of the adolescent.

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[2] Ibid., p. 75.

[3] Ibid., p. 76.

Mathematics is presented to enhance intellectual and emotional formation, especially when based in the satisfaction of seeing advanced equations materialized through manipulation. The curricular goal is to give new relevance to mathematics as a preparation for life through an understanding of the forms and causality of nature. Therefore, mathematics is applied to business, to forms in nature, to astronomy, and to surveying the land. Crafts such as carpentry come to bear in the development of exactness, which is part of the confidence-building of the adolescent, akin to the need for the refinement of movement for the child under six.

The internal relationship between concrete and analytic operations utilizes geometric representations to model relationships. A concrete approach to mathematics enables students who are transitional in their analytic operations to refer to the concrete. Furthermore, the relationship between concrete and analytic demonstrates to the adolescent the limits of abstract learning. The historical and intellectual origins of math are to be found in concrete operations in all aspects of business and farm functions.

Language is part of personality development insofar as it is respected for its ability to foster relationships, express thoughts, advance plans, build businesses, and provide the basis for social connection within the peer group as well as in areas of community commerce and exchange.

3. Education as the Preparation for Adult Life

Montessori puts forth a general education classified into three groups: 1) the study of earth and living things; 2) the study of human progress and the building up of civilization; and 3) the study of the history of humankind.[3] How does this educational orientation for the adolescent integrate with the practical work of the farm and flow from the Cosmic Education themes of the elementary years?

The Study of Earth and Living Things. On the farm, the subject areas of geology, geography (including prehistoric periods), biology, cosmology, botany, zoology, physiology, astronomy, and comparative anatomy arise out of both the farm operation and the implicit natural science of its various habitats, flora, and fauna.

The interdependencies in nature are revisited from the point of view of the chemistry and physics of life, including the water cycle, the carbon cycle, the life cycle, the vital functions of higher plants, cell machinery, ecosystems, the chemistry of the soil, the history of the soil, and the mechanics of nature, including mass, inertia, force, velocity, work, acceleration, etc. Farm enterprises would provide practical incentives for mastering many of these concepts.

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[1] Ibid., p. 72.

[2] Ibid., p. 72.

[3] Ibid., pp. 76-79.

The Study of Human Progress and the Building up of Civilization. The technology of automotives, physics, chemistry, and computers interacts with life on the farm. When adolescents work with the means of production using simple machines, human progress is a part of daily living. Vintage machines and modern machines could initiate studies of the history of technology with the intention of teaching the young adolescent an appreciation of technology's contribution. Technology is rooted in the practical, in solving problems that arise in working with nature and buildings. Farm machines provide an education about the technology of automotives, the efficiency of work, and the computational treatment of environmental factors that affect productivity. Other technological machines to be used include microprocessors and household appliances with sensors and other means of measuring heat, light, and noise. The course of study would emphasize how technology has changed history by placing the human being in a position of control, and what moral responsibilities this control brings.

The Study of the History of Humankind. Montessori makes a comprehensive list of history topics that includes scientific discoveries, geographic explorations, the relationship of humans to the environment, contact among different peoples, war and peace, religion, patriotism, a detailed study of one period, the life of one person, the present day and nation, law, and government.

The spirit of the studies entails a holistic view of the earth, looking at the global economy in relation to resources and the environment. The natural environment would enhance a student's concept of space and place; the spatial dimension of human experience; the physical systems and dynamics of the earth's surface; the ecosystems on the earth's surface; the migration of human populations; the processes, patterns, and functions of human settlement; the patterns and networks of economic interdependence; how human actions modify the physical environment; and the role of geography in telling stories of past and future. The elemental nature of the farm, its subsistence level of living, can convey the power of human history in its conquest of nature while being mindful of the limits of human exploitation.

Future Trends

A few farm experiments are testing the premises of Montessori Erdkinder to see if a holistic experience of a farm community, the history of the surrounding community, and connections to real responsibilities can fully integrate an educational syllabus that also incorporates in some way the necessary state requirements for junior high and high school. In the upcoming years, the Erdkinder approach may lend new meaning and organization to school-based models and how they organize their studies and field experiences.

The Architectural Expression of the Developmental Continuum

Introduction

This chapter tracks the needs of the physical environment as a school evolves from its beginnings through expansion phases, presenting an overview of issues to consider when building a school from the ground up. Projecting Montessori buildings of the future, the chapter creates the basis for architectural design for infancy through adolescence.

Beginning

In the beginning stage, the concerns of schools are basic and include location, space, safety, and economy. Usually the fledgling school is in a rented building, often one *not* originally intended for educational use.

When choosing a rental space, it is important to have at least a general idea of just how temporary the space will be and when a permanent site might be considered. Enrollment projections could be helpful in imagining the potential and maximum use of the space. The selection of a rental property for a school has many variables, but, fortunately, most of them involve common sense.

For information on enrollment projections, see Chapters 3 and 14

A discrete annex, wing, or section of a building is often a good find because it can give privacy and also add identity to the program. Likewise, classrooms in proximity build community. Consider the potential for expansion and for use of the outdoors, including nearby parks and

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Contributions to this chapter were made by Victor Sidy, Claudia Castro, and Steve Lawrence as an outgrowth of the Montessori architecture project undertaken by NAMTA and Taliesin Architects of Spring Green, WI, and Scottsdale, AZ.

public recreation facilities. Also consider the potential for "going out" into the neighborhood to visit businesses, museums, the public library, etc.

The motivation of your potential landlord can affect the rental price; hopefully, some altruism and support of the school is part of the spirit of the lease. Look also at co-tenants in the building and consider their compatibility in terms of noise level, etiquette, safety and security, and image.

Three to five years is a typical lease period. Ideally, the lease should include first right of refusal if the building is placed on the market. It is important that the lease allow for at least one year's notice of cancellation to protect the school from serious disruptions of operations. Usually some capital improvements must be made to a rental site to meet laws, regulations, and codes: the Americans with Disabilities Act for accessibility issues; fire and building codes for electrical and plumbing work, alarms and signage, asbestos removal, exits, roof, boiler, etc. Check all applicable federal, state, and local building regulations to assess what will have to be done, and then make sure the necessary expenses are fully calculated and considered in the rent negotiations and lease. Sympathetic landlords will often forgive rent in return for initial capital improvements. Normally, boiler and roof expenses are the responsibility of the landlord, except in "triple net" lease agreements, in which the tenant agrees to pay insurance, property tax, maintenance, and other occupancy costs in addition to rent.

As a finishing touch, a sign in front bearing the school's name adds both identity and unity to the program.

Expanding the School

Once maximum use has been reached, the school can begin to buy, build, or relocate to a larger rental site. This choice should be prompted by foreseeable needs, long-range goals, and identity issues.

Needs

See Chapter 14 for more information on determining the financial feasibility of an expansion project

A school that is bursting at its seams is very well aware of its need for expansion. Determining needs that can realistically be met within budgetary constraints is the challenge. In the needs assessment stage (which architects refer to as the *programming* stage), a comprehensive analysis of space needs should include square-footage allocations for classrooms, administration, and miscellaneous spaces (see Close-Up, Designing the Architectural Continuum, pages 143-145). In addition, parking analysis, utility needs, and the outdoor environment are important considerations.

Issues that often need to be addressed in the process of developing new schools include the following:

- Child safety
- School security

- Building longevity
- Environmental sensitivity
- Indoor health
- Sense of school community
- Indoor-outdoor connection
- Classroom practicality

Resolving these issues can be part of an architect's design services.

Goals

Like all planning, needs assessment involves anticipating future scenarios. Will the school eventually expand to accommodate additional age groups? Additional classrooms? Will it want to offer "all-day Montessori"? Will it ever want to add art, music, science, and computer spaces to its classrooms? What adult spaces will be needed, such as staff kitchen and lunchroom, storage, and office space? Some climates need large indoor spaces such as gymnasiums; often these spaces are developed in later years when finances permit.

Chapter 4 gives a full overview of all-day options

Identity

New expansions are opportunities to refine or re-define the identity of a school. School identity is closely linked to what head of school, board members, teachers, parents, funding sources, and the community want their school to become.

A Montessori school campus, so often the physical extension of years of devoted effort and love, will tell a story of its origins and communicate its aspirations. These forces subtly shape the school's physical character and are what make a school a memorable and revered place. When a school is to be designed from scratch or when new additions are to be made, the process must include a sensitivity for this subtle character and an understanding of the context within which the new building is created.

The architectural character of the school should also be tempered by the challenges unique to the site and program. Architects can find innovative solutions to the complex issues of planning a new school. An urban school, for instance, will have a far different identity than a suburban or rural school, and these differences need to be honored.

Issues of physical school identity include:

- Relationship of school to surrounding community
- Relationship of school to nature
- Building type and scale

See Appendix 4 for a list of Montessori-friendly architectural firms.

- Building materials

The architectural expression of a school can convey the character of the school itself: dignified, spontaneous, reserved, casual, progressive, etc. Although the Montessori pedagogy and legacy provides an undertone of order, beauty, and grace, there are an infinite number of ways to elaborate on these themes. All schools have unique characteristics that need to be part of a community planning process.

Renovating an Older Building

Often acquiring and renovating an existing building is the most viable option for expansion. Depending on the condition of the acquired building and the amount of change needed, the costs of renovations vary widely. In smaller renovation projects, modifications can be minimal and mostly cosmetic; however, a major renovation can be time-consuming and costly.

Advantages of renovating include:

- **Location.** Often the best place for a school is within an already established community where vacant land may be non-existent, expensive, or difficult to develop.
- **Time.** Building a new school from the ground up is a time-consuming process. Existing buildings can often be turned into schools with little extra effort.
- **Cost.** Although remodeling costs may vary, finding an existing building that can support a school's needs without considerable extra work can often be extremely cost-effective.
- **Beauty.** Old buildings often have special charms of their own, which can never be replicated. Adopting an older building can add richness to the learning environment.

Disadvantages of renovating include:

- **Needs.** Existing buildings often do not fulfill Montessori space and function needs. Forcing educational uses into environments that are incompatible can create logistical problems.
- **Cost.** Renovating buildings can often be costly, especially when structural or utility systems need repair. In addition, maintenance and upkeep on an aging building can drain a school's resources.
- **Image.** A mismatched building can create conflicting messages to its users. A physically dirty building, for example, may reduce the impact of the Montessori emphasis on cleanliness and neatness. The image or "packaging" of a building, like the packaging of other commercial products, can also affect marketing and enrollment.

Any school building, whether built from scratch or remodeled, should be recognized as part of a dynamic continuum of change. Often the most successful buildings are those that allow for change in use or technology. A good design will accommodate flexibility and alteration: "A building is not something you finish. A building is something you start."[1]

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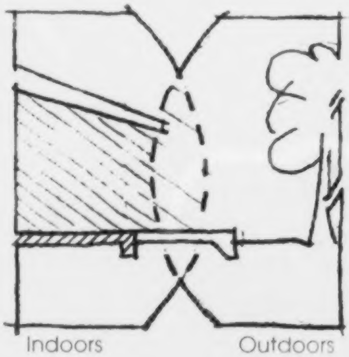
[1] Brand, Stewart. *How Buildings Learn: What Happens After They're Built.* New York: Viking Penguin, 1994, p. 188.

Ideas for New Schools

When a school or classrooms are built from scratch, there is the possibility of designing the building such to reinforce Montessori pedagogy and aid the teacher. Usually there are several modifications that can be made for little or no extra cost, just intelligent planning.

Designing for the Complete Learning Environment

Montessori education occurs in a complete *learning environment*, not just a classroom. The place where children learn is not just the classroom, but rather the classroom in concert with equally important outdoor spaces. The connection between the indoors and outdoors should be generous, and the transition gradual.



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The design of the learning environment can reflect the changes of the child over time. The needs of a two-year-old are far different than the needs of a nine-year-old, and it is logical that the design of the spaces reflect this.

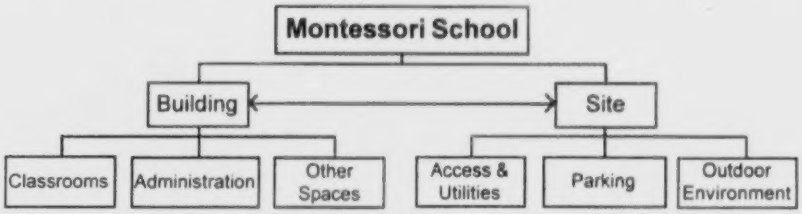
Learning environments for children in the first plane of development (0-6 years) should be shaped in accordance with the smaller scale of the children. Kitchens, toilets, sinks, furniture, doors, windows, and floor coverings are especially important design considerations for the younger age groups (see this chapter's FYI article by Lili Peller). Environments for the Nido (2-14 months) have special needs such as nap areas, diaper changing zones, physical movement objects, and parent interaction areas, including nursing. At the Nido level, the outdoor space can be small and intimate, but as the child grows, the realm of outdoor exploration should expand accordingly.

Elementary children, who are in the second plane of development (6-12), need spaces that reflect their intellectual tendencies. Whereas preschool classrooms need an open layout so that the teachers can monitor the classrooms easily, the elementary classrooms can provide more distinct areas for specialized activity. Nooks for focused study with reference areas in close proxim-

Overview of School Architectural Elements

The configuration of these elements depends on each school's needs, future goals, and vision of what it would like to become.

The following chart is useful for a balanced overview of all considerations when establishing an architectural plan:



ity are examples of these particular needs. Space adaptations may be required for equipment associated with art, music, science, and computers. Often these shared areas can be common to two adjacent classrooms; this encourages inter-class communication. At this age level, the outdoor "classroom" can be the entire school campus and eventually the greater community. Alcove areas with a phone, phone books, maps, and directories symbolize and facilitate "going out" activities.

Interior Classroom Layout

See Chapter 4 and Appendix 1 for more information about the teacher's options in arranging the prepared environment.

There are several rules of thumb for interior layout which are hardly novel but deserve to be mentioned. Understanding these can aid the architect in issues such as classroom shape, orientation, floor coverings, ceiling heights, lighting, and utility zones. However, a top priority should be flexibility; a good design will allow teachers the freedom to arrange the classroom to meet their needs.

Activity areas: The interior classroom should be zoned so that conflicting activities are furthest apart. Messy areas such as practical life should be distant from the cleaner reading and mathematics areas. Placing nap areas furthest from high-activity areas such as the food preparation area eliminates the need for sound-protecting walls or partitions. This is especially crucial in the younger classes, where the teacher must be able to monitor the classroom without visual impediments.

Gathering areas: Montessori classrooms usually need a place where all of the children can gather for group activities. Some teachers find that the group activity area works well roughly in the center of the classroom, surrounded by more specialized zones. During times that the group is not assembled, activity from the more specialized areas can spill into this area. The central area also can separate conflicting uses (see above). Note that some teachers prefer to arrange their classroom into several smaller gathering areas (see this chapter's FYI article by Lili Peller). A good plan will allow for individual teacher preferences in classroom layout.

Entry: The entry area sets the tone for the classroom. It should almost be its own separate room. A distinct entry area with space for coat and bag storage, changing benches, and circulation is practical as well.

Transition spaces: Transition spaces need to be a place in their own right. They should encourage interaction between children from different classes and between parents and teachers, and provide a ceremonial parting point for parents leaving their children. If the entry to the classroom is direct from the outdoors, it is most appealing when it faces east for exposure to the morning sun. Also important is an articulated and sheltered front "porch" outside the entry.

The American Institute of Architects, Washington D.C., publishes an architectural guide entitled *Reinvigorating Our Schools*. Call 1-800-365-2724, order # W866.

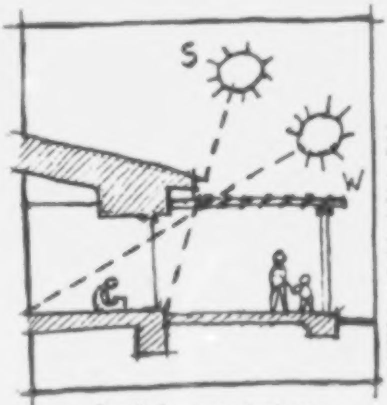
The Environmentally Sensitive School

Any new building should be designed with a sensitivity to the environment. Because Montessori emphasizes interdependency and caring for the natural environment, a Montessori school should be particularly environmentally sensitive. There are several principles which, when followed in the design of new schools and classrooms, can radically reduce energy consumption and add to the physical comfort of the facility. Best of all, these principles can be realized with little or no extra cost, and often result in long-term energy savings.

Thermal Comfort

The easiest way to conserve energy, reduce heating/cooling costs, and provide thermal comfort is to design with respect to the sun. The following observations apply to almost all northern-hemisphere climates:

Windows: South-facing windows with overhangs allow the low winter sun to penetrate and warm the interior space. Horizontal overhangs or trellises with deciduous foliage can shade against the high summer sun.



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South-facing windows

Outdoor Space: The outdoor environment for each individual class is best located to the south side of the indoor classroom. This works well in tandem with south-facing windows. This strategy is effective even in hot climates, as long as deciduous plants and vines are located to shade the space in the summer. "Always place buildings to the north of the outdoor spaces that go with them, and keep the outdoor spaces to the south."[2] Educators can appreciate the joy of a sunny day, with generous doors flung open to a warm terrace. This is possible simply with intelligent planning and, wonderfully, no extra cost.

Entry: When possible, orienting the outside entrance of a school or classroom to the east provides a bright, sunny welcome to the classroom. When the entrance is an almost-separate room, it acts as a thermal buffer, reducing drafts inside and minimizing thermal loss to the outside.

Radiant Floor Heating: Although this requires an initial investment, integral floor heating is an excellent low-energy method to heat a classroom space. This is especially worthwhile for children, who spend a great deal of time working on the floor.

North Protection: In most climates, the coldest side of a building is the north side. Adding extra buffering, such as coniferous vegetation, utility/storage spaces, and earth berming, can reduce energy consumption. However, strategic windows on the north side are important for lighting, as the following section will illustrate.

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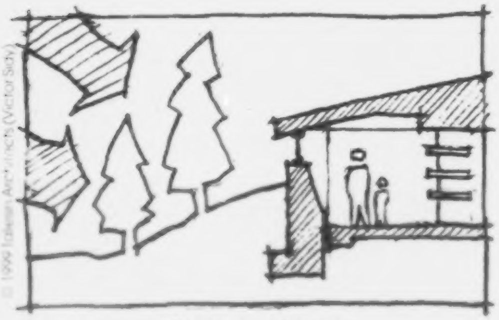
[2] Alexander, Christopher. *A Pattern Language*. New York: Oxford University Press, 1977, p. 516.



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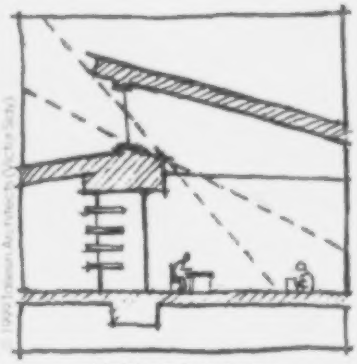
North protection



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Light on two sides

Lighting

Good lighting is critical for children's meticulous activity. Yet it comes at a high price. According to some sources, fifty percent of building energy consumption in the United States is used in lighting-related costs.[1] These figures can be drastically reduced with well-planned natural lighting.

North light: North light is the ideal work light because it minimizes glare and shadows. A band of high, energy-glazed, north-facing windows, skylights, or a clerestory can draw clear, diffused light into the classroom. Done correctly, this can eliminate the need for artificial light, even on cloudy days.

Light on at least two sides of the classroom: This provides a quality of light that reduces glare and shadow, which is crucial for children's activities. "When they have a choice, people will always gravitate to those rooms which have light on two sides…"[2]

School Community

One of the determiners of an organization's health is the sense of community it is able to foster. The layout of a school can affect this. Central spaces, such as plazas or atria, can be powerful community centers, symbolizing a unified school presence. A front entry, common to everyone, can also achieve coherence as well as provide a single control point for monitoring students and visitors. Hallways and other circulation zones are often where informal interaction takes place, and the design of these spaces should promote this. Details like side benches and low, wide walls (for sitting) can encourage contact among all ages.

The "Teaching" Building

The building itself can be a presence that contains or reinforces lessons in geometry, materials, structure, and physical forces. For example, a classroom could be designed on a rectangular unit system, with every structural column located eight feet on center, the wall panels proportioned according to the golden section, the windows square, and the roof slope reflecting a Pythagorean right triangle. Or an electrical conduit could be left exposed and painted a bright color to show how electricity travels from switch to light bulb. Perhaps the conduit could continue back to the electrical box and finally to the power line. De-mystifying forces and objects that we take for granted can open a rich world of possibilities in the design of buildings. Different lessons could be emphasized for different age groups. The challenge is to let the building teach in simple, inexpensive, and intelligent ways.

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[1] Aitken, Donald. "Bio-Climactic Architecture." Lecture at The Frank Lloyd Wright School of Architecture, Scottsdale, Arizona, April 2, 1999.

[2] Alexander, op. cit., p. 747.

The School of the Future

It is tempting to ask what the Montessori school of the future will look like. This line of questioning, however, can lead to treacherous ground. Within the context of Montessori, there is a richness that would be undermined if monolithic prescriptions for the future were to prevail. Successful schools should be the true examples for future development. Nevertheless, there are several directions to which schools can aspire in architectural terms.

Sustainability

Environmentally sustainable school buildings are becoming increasingly viable possibilities for every budget and geographic region. Importantly, approaching sustainability in contemporary terms means using our understanding of environmental forces to augment the quality of comfort, health, and beauty in buildings while minimizing harmful and costly environmental impact. Several factors contribute to this trend:

- Environmentally friendly building materials have finally become cost-effective. These include products made from recycled materials and minimally processed materials.
- Healthy building materials have been identified. Research has proven that gases emitted from some carpet adhesives, paints, particleboard cabinetry, and other materials can cause serious health implications and reduction in productivity to occupants of "sick buildings." Manufacturers are now making safer building materials.
- Bio-climatic design is gaining prominence. Taking advantage of the natural cycles of the sun, wind, water, and vegetation, as well as the properties of building materials, can reduce energy consumption drastically (see thermal and lighting solutions, above).

Community

In tribal societies, education is often a cultural center point of a village. Rites of passage celebrate the development of community members. In urban/industrial societies, the lack of a sense of community in many cities can be read as a symptom of our alienation from the interpersonal contact so important for a healthy society. It is a worthy challenge for schools to provide a focus for community integration and interaction. The architecture of a school can support this effort in several ways:

- The location of a school central to a residential neighborhood is important. Many urban researchers stress that schools should be within walking distance of the population they serve.[5]
- The school can provide meeting and gathering facilities for the greater community. This can bring people of different interests and backgrounds together and also help raise awareness of the school for enrollment and fundraising purposes.

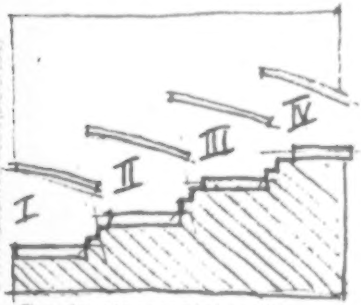
Ibid.

- The school can educate the community about common values. It is important to teach a child about order, dignity, and respect; often adults need to be reminded of these values as well. Providing observation rooms and spaces to exhibit student work are ways in which the school can make its values visible to the community.

- The school can symbolically anchor the community. Its architecture can draw from the community's identity and history to provide an interpretation of its role in the community.

The Developmental Continuum

A full-spectrum school that ranges from birth to adulthood has the potential for radically redefining social norms. As teenagers move to adulthood, they begin to connect with the working world. Montessori observed the natural tendency of this age group to apprentice to adults and gradually establish their own place in society. Likewise, a school that educates the full age spectrum could potentially find a new role for itself in the cultural and economic lifeblood of its community. Such radical social change would have equally important implications on the architectural landscape of entire communities.



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The developmental continuum

Montessori educators are uniquely poised to redefine the concept of architecture for the developmental continuum. The full understanding of the child's educational needs so germane to Montessori can contribute to yet unforeseen learning environments, based on solid principles, that can challenge traditional paradigms of school design.

DESIGNING THE ARCHITECTURAL CONTINUUM

An important aspect of developing an individual scheme for a maturing school is to think of the building not only as a functional necessity but as a means to reflect and manifest the idea of the environment as an aid to the child's development. Therefore it is important to look at space as a means to manifest the holistic Montessori vision. The following suggestions present a general guideline for classrooms, administrative spaces, and other spaces. They are by no means comprehensive and will, of course, change depending on the needs and means of the school.

Nido
(Children 2-14 months)
To accommodate 9 children, 3 adults

Space Requirements:

Classroom	800 sq ft
Nido Garden	400 sq ft

Space Description:

Interior

- Provide for: Entrance, Movement, Changing Area, Nursing/Rocking Areas, Sleeping Area
- Very safe environment
- Kitchen and bathroom (adult proportions)
- Bathroom to include changing area with child-height benches, hooks, cupboards
- Level changes, different ceiling heights
- Windows, fixtures, hardware in child proportions and sizes
- Close connection between indoors and outdoors
- Easily cleanable surfaces
- Under-floor heating

Exterior

- Grassy area, sandbox, flowers/herbs, low hill, low swing, shallow pools
- Sunny as well as shady areas
- Some area to be protected from sun and rain

Fixtures:

- Different floor surfaces that are warm and soft
- Stairs, other climbing objects, bars
- Low shelves, mirrors, clothing rods, hooks
- Storage for spare clothing
- Bathtub, changing table

Infant/Toddler or Young Children's Community
(Children 14 months to 3 years)
To accommodate 10-12 children, 3 adults

Space Requirements:

Classroom	1,000 sq ft
Veranda/Terrace	300 sq ft
Infant Garden	600 sq ft

Space Description:

Interior

- Provide for: Entrance, Movement, Practical Life, Working/Manipulation, Reading Corner, Sleeping Area
- Kitchen and bathroom (child proportions)
- Level changes, different ceiling heights
- Windows, fixtures, hardware in child proportions and sizes
- Close connection between indoors and outdoors
- Easily cleanable surfaces
- Under-floor heating

Exterior

- Sunny as well as shady areas
- Outdoor activities, including climbing, tunneling, sliding, space for pushing toys, riding
- Wet area, sandbox
- Vegetable garden, flowers
- Some area to be protected from sun and rain

Fixtures:

- Cubbies, benches, coathooks
- Small sinks, toilets, and potties, bathtub
- Low shelves, low mirrors
- Refrigerator, low oven & cook-top

Children's House, Primary, or Preschool
(Children 3-6 years)
To accommodate 30 children, 2 adults

Space Requirements:

Classroom	1,200 sq ft
Veranda/Terrace	600 sq ft
Garden	1,200 sq ft

Space Description:

Interior

- Provide for: Entrance with Coat Storage, Quiet Area, Movement, Working, Reading, Snack, Art
- Open space, all parts visible to the teacher
- Variety of spaces, intimate and community spaces, spaciousness as well as enclosure
- A lot of wall space, window seats
- Kitchen and bathroom (child proportions)
- Windows, fixtures, hardware in child proportions and sizes
- Level changes, different ceiling heights
- Close connection between indoors and outdoors
- Easily cleanable surfaces
- Under-floor heating

Exterior

- Various characteristics, from cultivated and intimate to wild and expansive areas
- Hard and soft surfaces, wet area
- Some area to be protected from sun and rain

Fixtures:

- Low shelves/cupboards
- Cubbies, benches, coathooks
- Refrigerator, low oven & cook-top
- Treehouse (optional)
- Boot rack & boot scraper

DESIGNING THE ARCHITECTURAL CONTINUUM, CONTINUED

Lower Elementary
(Children 6-9 years)
To accommodate 30 children, 2 adults

Space Requirements:

Classroom	1,200 sq.ft.
Veranda/Terrace	600 sq.ft.
Garden	2,500 sq.ft.

Space Description:

Interior
- Provide for: Science, Computer, Library/Audio-Visual, Music, Art, Work, Quiet
- Open space, most parts visible to the teacher
- Kitchen and bathroom (adult proportions)
- A lot of wall space, window seats
- Level changes, different ceiling heights
- Close connection between indoors and outdoors
- Easily cleanable surfaces
- Variety of floor surfaces (carpet, wood, tile, etc.)
- Under-floor heating

Exterior
- Wide fields for exploration
- Some area to be protected from sun and rain
- Community as external resource

Fixtures:

- Shelves/cupboards at child height
- Appropriate size furniture
- Refrigerator
- Drinking fountains at child height
- Low oven & cook-top
- Telephones for children's use

Upper Elementary
(Children 9-12 years)
To accommodate 30 children, 2 adults

Space Requirements:

Classroom	1,200 sq.ft.
Veranda/Terrace	600 sq.ft.
Garden	2,500 sq.ft.

Space Description:

Interior
- Provide for: Science, Computer, Library/Audio-Visual, Music, Art, Work, Quiet
- Open space, most parts visible to the teacher
- Kitchen and bathroom (adult proportions)
- A lot of wall space, window seats
- Level changes, different ceiling heights
- Close connection between indoors and outdoors
- Easily cleanable surfaces
- Variety of floor surfaces (carpet, wood, tile, etc.)
- Under-floor heating
- More book and specialty space than the lower elementary

Exterior
- Wide fields for exploration
- Some area to be protected from sun and rain
- Community as external resource

Fixtures:

- Shelves/cupboards at adult height
- Appropriate size furniture
- Refrigerator
- Drinking fountains at adult height
- Oven & cook-top at adult height
- Telephones for children's use

Middle School/Junior High
(Children 12-15 years)
To accommodate 44-60 children, 4-6 adults

Space Requirements:

Classroom	2,400 sq.ft.
Enclosed Meeting Rooms	700 sq.ft. each
Veranda/Terrace	600 sq.ft.
Garden	4,000 sq.ft.

Space Description:

Interior
- Provide for: Independent Work, Group Work, Science Lab, Art, Library, Computer, Music
- Kitchen and bathroom (adult proportions)
- Level changes, different ceiling heights
- Close connection between indoors and outdoors
- Small stage/performance area

Exterior
- Proximity to woods, ponds, and other natural features
- Community as external resource

Fixtures:

- Science lab: sinks, tables, ventilation hoods, etc
- Telephones for children's use
- Storage
- Refrigerator
- Drinking fountains at adult height

DESIGNING THE ARCHITECTURAL CONTINUUM, CONTINUED

Erdkinder
(Children from 12-15 years)
A separate, rural site
To accommodate 30-35 children, 7 adults

Space Requirements:

Indoor Spaces	
Entrance/reception area	100 sq.ft.
Dining room	850 sq.ft.
Kitchen, commercial-style if possible	500 sq.ft.
Living room/performance space	350 sq.ft.
Dormitory rooms	400 sq.ft.
Studio-style classroom	1,200 sq.ft.
Library/study	300 sq.ft.
Lounge/recreation space	1,200 sq.ft.
Mud room with lockers	300 sq.ft.
Laundry	200 sq.ft.
Storage	850 sq.ft.
Intern suite	800 sq.ft.
Adult sleeping rooms	300 sq.ft.
Mechanical room	200 sq.ft.
Office	
Staff room	
Caretaker's apartment	
Walk-in cooler (optional)	
Science lab	
Plenty of outlets for computers & other equipment	
Visitor suites, bed-and-breakfast style	

Outdoor Spaces

Tool shed
Vegetable garden
Grain field
Barn with wood shop & craft area
Animal barn and barnyard
Produce stand

Staff/Administration Area
(1-15 Employees)

Space Requirements:

Office/Front Desk/Reception	200 sq.ft.
Staff Area/Lounge	500 sq.ft.
Administrator's Office	250 sq.ft.
Teacher's Office	150 sq.ft.
Patio (optional)	400 sq.ft.

Space Description:

Interior

- Quiet
- Kitchen with eating area (optional)
- Adult bathroom with optional shower
- Seating and conference area

Fixtures:

- Adult-size furniture
- Individual desks
- Lockers/closets/shelves
- Refrigerator
- Some child-sized furniture

Other Facilities
(Added as needed)
Size determined by scale of school; figures given here are standard sizes

Space Requirements:

Health room	400 sq.ft.
Laundry room	300 sq.ft.
Storage room	400 sq.ft.
Mechanical room	depends on size of furnace
Parent education room	600 sq.ft.
Multi-purpose room (meals, exhibitions, etc.)	1,000 sq.ft.
Performance space	1,500 sq.ft.
Playing field	regulation soccer field
Gymnasium	regulation basketball court
Tool shed	200 sq.ft.
Janitor's room	300 sq.ft.
Delivery area	based on need
Parking: staff, visitor, parent	based on need
Pickup & drop-off area	based on need

Frequently Asked Questions

As a new school, should we buy or rent?

When starting out, most schools rent a facility in order to minimize the already high start-up costs involved in equipping the classroom(s) with Montessori materials. Even the wealthiest operations should hold up building plans until the school gets a feel for its own operating needs and general enrollment patterns. Aside from financial considerations, it may simply be too much to ask a head of school to start a new school and supervise a building plan simultaneously. But if the capital is there, and if the school community really wants to build, first consult with more experienced Montessori schools. And before taking on a mortgage, assess the school's market.

When should we buy or build our own facility?

For detailed instructions on projecting needs and costs connected with an expansion, see Chapter 14.

This is a subjective decision. The usual financial factors include a capital reserve of 25% of the operating budget, a well established annual giving program, a space that is "bursting at the seams," and conservative projections that show what can be raised and what must be mortgaged. Many schools wait until they add elementary-level programming before embarking on a building expansion plan because elementary parents tend to see their commitment in long-range terms and will give more for a building. Most compelling is that large gift by some philanthropist who wants to see the school built.

Why hire an architect?

Basic services an architect can provide include:

- formulating needs into plans
- solving site-specific issues
- coordinating structural, mechanical, and civil engineering services
- researching and specifying materials and methods of construction
- meeting building code requirements for life-safety issues
- preparing documents for official plan checks and approval
- orchestrating the contractor bidding and selection process
- monitoring construction costs
- administering the construction contract

A common misconception is that architects are expensive. In simple economic terms, hiring an architect can actually save money. A good architectural design "will save enough in lowered energy and maintenance costs over a typical 40-year life-cycle to pay for itself many times over."[6] A design sensitive to the needs of children can reinforce the Montessori pedagogy and actually aid the teacher. Poor lighting, acoustics, and ventilation can make a space oppressive and draining, which reduces teacher productivity and student performance. These issues are especially critical in a school.

What would be a typical process for organizing staff input for an architectural design?

The effectiveness of an architect is usually directly related to the quality of information he or she can collect about the project. Most architects prefer as much detailed information on needs, budget, and site as possible. If the school administration or building committee is unsure about its specific needs, it can engage the architect to conduct staff interviews or facilitate a "visioning session," a townhall-type meeting that can provide direction to the project as well as involve the entire school community in the design process.

How does one prepare a master plan that will accommodate unforeseen growth?

Planning ahead can save money and headaches in the long run. Adding facilities to a school on a site that was built without accounting for expansion can be costly. Several actions can be taken to accommodate future growth:

- Begin with a site larger than initially needed.
- If initial funds are available, build a wing that can be rented to a compatible organization and later expanded into. Income from the rent can help offset building costs.
- If the school is in a renovated building, make sure that the building can be added onto or can be altered to allow expansion.
- If the future is unclear (and isn't it always?), planning with scenarios is often effective. Make several scenarios based on possible growth projections and make plans that can accommodate all scenarios. "Scenario planning reduces the likelihood of being pushed around by a building obdurately clinging to a future that never happened."[7]

What about the specialty question? How much should we invest in specialty rooms? How can specialty rooms be created economically?

Specialty rooms are often built in the later phases of a school's evolution. They accommodate activities such as art, music, science, performance, and sports. Because they often contain spe-

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[6] American Institute of Architects. *Reinvigorating Our Schools.* Washington D.C.: AIA, n.d.

[7] Brand, op. cit., p. 182.

cialized equipment such as kilns, chemicals, and musical instruments, or need specific configurations (darkrooms, performance spaces) they are often located in areas remote from the classrooms. This can disrupt continuity within the classroom and depart from the Montessori interdisciplinary ideal. Special additional rooms can also be expensive.

It is possible and often cost-effective to develop specialty spaces within or adjacent to classrooms. Specialization can also develop within the classroom of an interested teacher; for example, a teacher whose students are especially interested in photography could set up a darkroom annex. Specialty spaces can also be developed between classrooms or in intermediate spaces such as niches adjacent to hallways. For classrooms anticipating adjacent specialty space development, the possibility needs to be designed into the initial plan. Special issues (acoustic, lighting, ventilation, fire danger, chemical storage, loading ramps, utilities, etc.) should also be considered.

Some activities, especially sports, *do* need distinct spaces. When and where to build specialty spaces are issues that need particular attention. Each school has a unique organizational structure, and the space configuration should reflect this structure.

Further Reading from NAMTA

The following articles and documents are available as photocopies from NAMTA. See Appendix 4 for ordering information.

Building Programs and School Architecture

Ackerman, Ron. "Low Cost Expansion." *The NAMTA Quarterly* 6.1 (1980, Fall): 1-4. 3 total pages.

Cook, Perry. "The Making of an Environment [Montessori in Redlands, Redlands, CA]." *The NAMTA Quarterly* 4.1-2 (1978-79, Fall/Winter): 21-24. 2 total pages.

Denmore, John R. "Henson Valley Montessori [Temple Hills, MD] Goes the Robert Leathers Playground Way." *The NAMTA Quarterly* 11.2 (1986, Winter): 55-57. 2 total pages.

Kahn, David. "The Montessori Secondary School–Developing the Urban Compromise." *The NAMTA Quarterly* 8.2 (1983, Winter-Spring): 1-21. 11 total pages.

Pellaton, Bob. "The Outdoor Environment, Are You Prepared?" *The NAMTA Quarterly* 2.2 (1976-77, Winter): 49-57. 5 total pages.

The Outdoor Environment

Bagiackas, Michael. "Development of a Montessori Outdoor Environment." *The NAMTA Journal* 17.3 (1992, Summer): 5-17. 7 total pages.

Barker, Richard. "The Farm Experience: Its Importance in a Child's Life." *The NAMTA Journal* 12.1 (1986-87, Fall-Winter): 10-18. 5 total pages.

Denmore, John R. "Henson Valley Montessori [Temple Hills, MD] Goes the Robert Leathers Playground Way." *The NAMTA Quarterly* 11.2 (1986, Winter): 55-57. 2 total pages.

Haines, Annette. "The Child and the World of Nature." *The NAMTA Journal* 17.1 (1991-92, Fall-Winter): 59-69. 6 total pages.

Hart, Roger A. "Affection for Nature and the Promotion of Earth Stewardship in Childhood." *The NAMTA Journal* 20.2 (1995, Spring): 59-68. 6 total pages.

Kahn, David. "The Montessori Legacy–Connecting the Outdoor and Indoor Environments." *The NAMTA Journal* 17.3 (1992, Summer): 1-3. 2 total pages.

Lucas, Bill. "Grounds for Change: Learning through Landscapes in Britain." *The NAMTA Journal* 20.2 (1995, Spring): 53-57. Reprinted from *American Horticulturist*, July, 1994. 3 total pages.

Moore, Robin C. "Outdoor Settings for Playing and Learning: Designing School Grounds to Meet the Needs of the Whole Child and the Whole Curriculum." *The NAMTA Journal* 21.3 (1996, Summer): 97-120. 13 total pages.

Pellaton, Bob. "The Outdoor Environment, Are You Prepared?" *The NAMTA Quarterly* 2.2 (1976-77, Winter): 49-57. 5 total pages.

Proctor, Pat Doyle. "Hershey Montessori School's Outdoor Environment [Concord Township, OH]." *The NAMTA Journal* 17.3 (1992, Summer): 19-23. 3 total pages.

The Prepared Environment—General Information

Czaja, Paul Clement. "Extending the Montessori Classroom into the Library." *The NAMTA Journal* 14.2 (1989, Winter-Spring): 52-55. 2 total pages.

Dzura, Gerald E. "The Prepared Environment Re-Examined." *The NAMTA Quarterly* 3.1 (1977, Fall): 43-46. 3 total pages.

Gupta, Rajendra K. "Needs of the Elementary-Age Child: Montessori Principles, Strategies, and Their Practical Implementations." *The NAMTA Journal* 17.1 (1991-92, Fall-Winter): 97-133. 19 total pages.

Joosten, A. M. "Notes on the Prepared Environment." *The NAMTA Quarterly* 4.1-2 (1978-79, Fall/Winter): 11-13. Excerpted from *Helping One Helping All (1)*. (1974) 2nd ed. Bombay, India: Indian Montessori Training Courses. 2 total pages.

Kahn, David. "Identifying the Elementary Environment." *The NAMTA Quarterly* 4.1-2 (1978-79, Fall/Winter): 14-17. 3 total pages.

Lennard, Mary Schlueter. "How to Include a Science Lab in a Montessori Primary Class: Experiments and Practical Considerations." *The NAMTA Quarterly* 10.1 (1985, Spring): 27-33. 4 total pages.

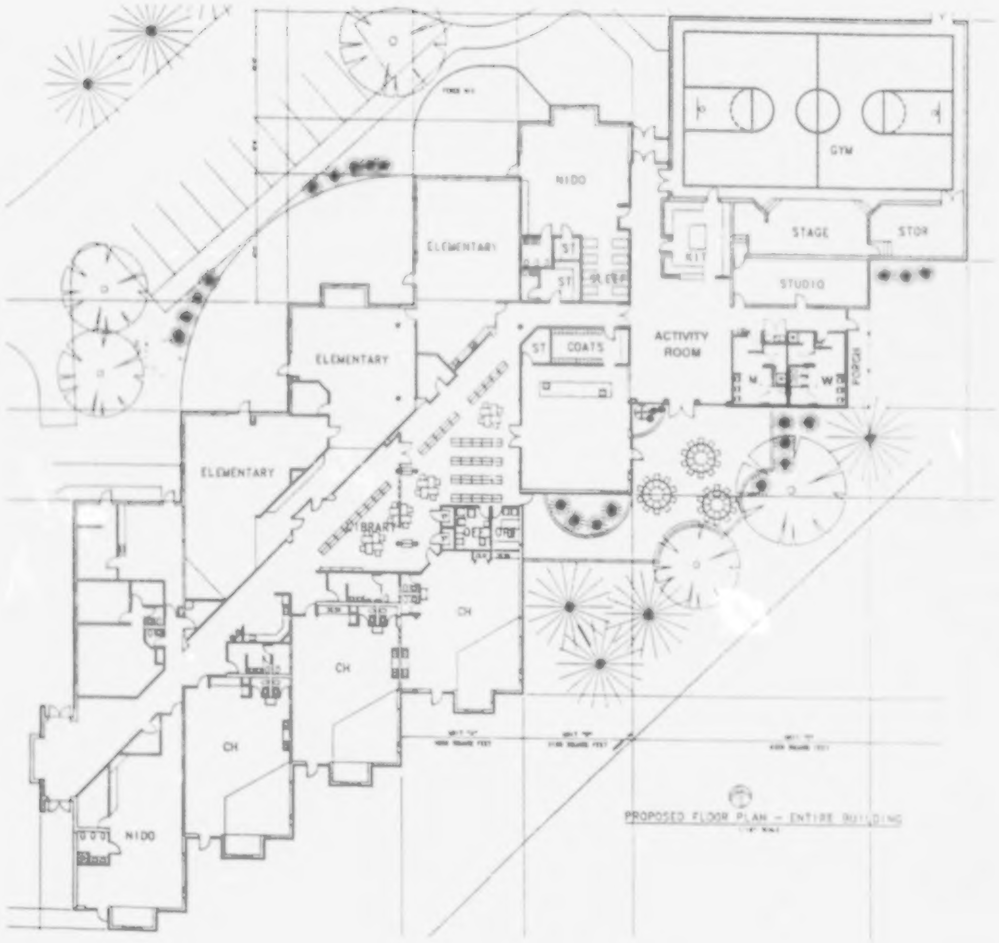
Miller, Jean K. "Insight through Observation." *The NAMTA Quarterly* 1.3 (1976, Spring): 32-37. 6 total pages.

Miller, Jean K. "The Prepared Environment." *The NAMTA Quarterly* 4.1-2 (1978-79, Fall/Winter): 1-10. 5 total pages.

Sample Documents

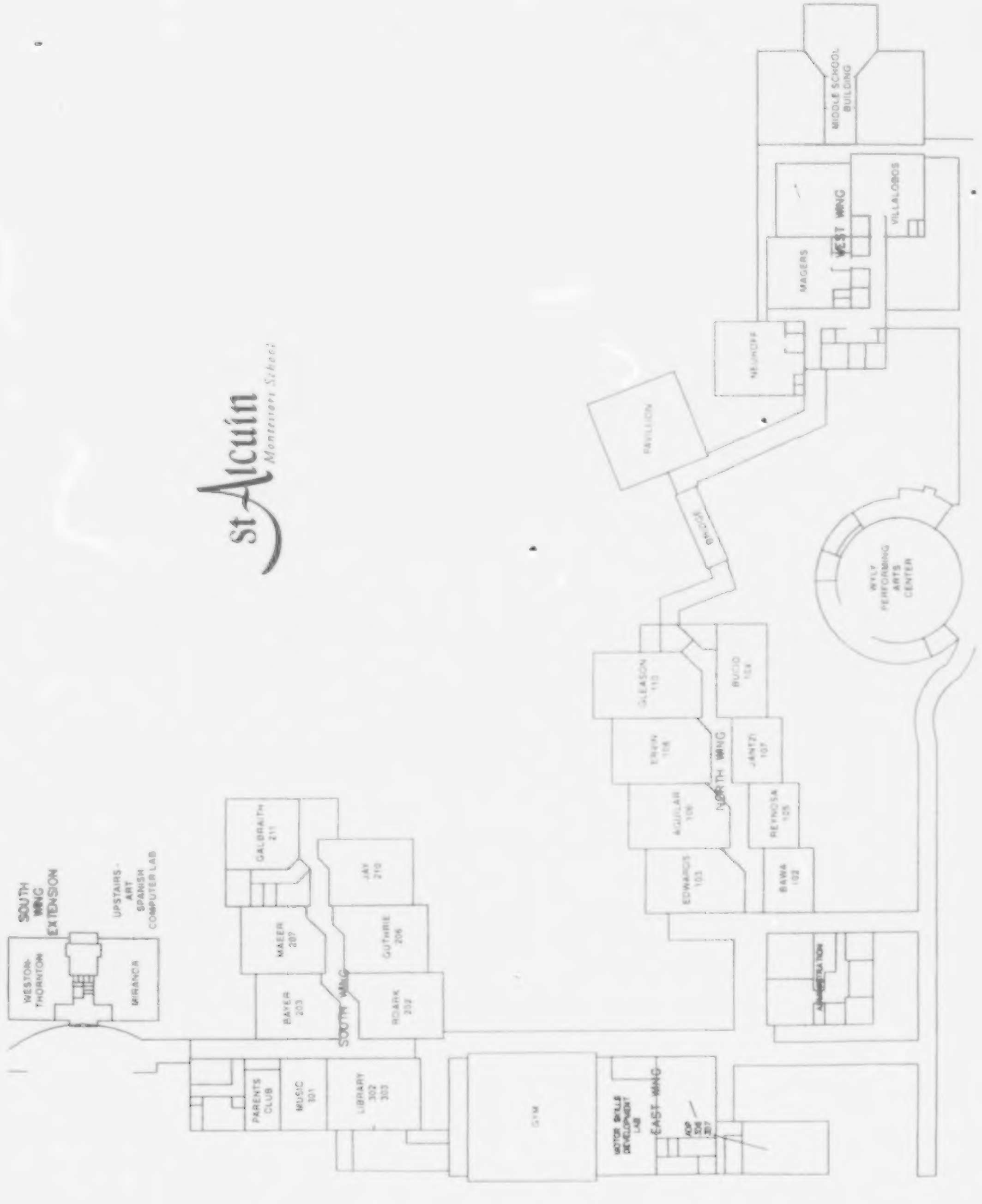
The following documents illustrate common practices in Montessori school operations. To view documents at full size, photocopy and enlarge.

Floor Plan, Hershey Montessori School (Concord Township, OH)


GYM
STAGE
STOR
KIT
STUDIO
NIDO
ELEMENTARY
ST
ST
SLEEP
ELEMENTARY
ST
COATS
ACTIVITY ROOM
M
W
PORCH
ELEMENTARY
LIBRARY
OFF
CH
CH
CH
NIDO
PROPOSED FLOOR PLAN – ENTIRE BUILDING

Hershey Montessori School's classrooms are offset in relation to each other, providing a diagonal corridor with niches in which are built a community kitchen, activity spaces, and a library. Each classroom has a high degree of privacy and individual outdoor learning and growing space.

Floor Plan, St. Alcuin Montessori School (Dallas, TX)


St Alcuin
Montessori School
SOUTH WING EXTENSION
WESTON-THORNTON
MIRANDA
UPSTAIRS - ART SPANISH COMPUTER LAB
PARENTS CLUB
MUSIC 301
LIBRARY 302 303
BAYER 203
MAEER 207
GALBRAITH 211
SOUTH WING
ROARK 202
GUTHRIE 206
JAY 210
GYM
MOTOR SKILLS DEVELOPMENT LAB
EAST WING
ADP 306 307
EDWARDS 103
AGUILAR 106
ERVIN 108
GLEASON 110
NORTH WING
BAWA 102
REYNOSA 105
JANTZI 107
BUCIO 104
ADMINISTRATION
BRIDGE
PAVILLION
WYLY PERFORMING ARTS CENTER
NEUHOFF
MAGERS
WEST WING
VILLALOBOS
MIDDLE SCHOOL BUILDING

BEST COPY AVAILABLE

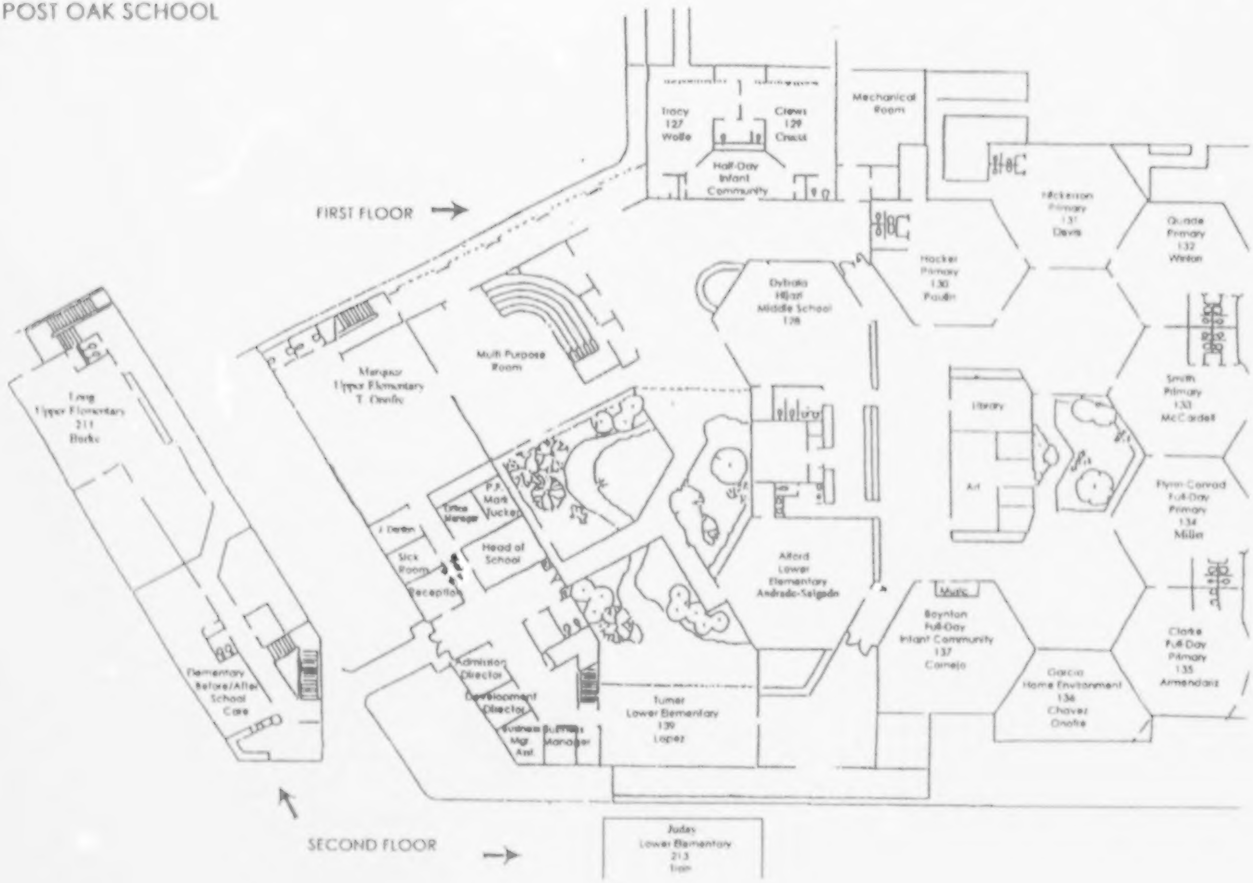
179

St. Alcuin's campus has clusters of classrooms, each with the classrooms offset to maximize privacy, window space, and outdoor access. The classrooms are connected by boardwalks and diversified horticulture. An arts center in the round is owned and used by the school and rented out to the community.

178

Many of Post Oak's glass-walled classrooms are hexagonal. Hallways are hexagons and irregular geometric shapes, creating a sense of the unexpected and experimental.

THE POST OAK SCHOOL


FIRST FLOOR
SECOND FLOOR
Tracy 127 Wolfe
Crews 129 Crouse
Half-Day Infant Community
Mechanical Room
Hickerson Primary 131 Davis
Quade Primary 132 Winton
Hacker Primary 130 Poulin
Dybala Hijazi Middle School 128
Multi Purpose Room
Marquez Upper Elementary T. Onofre
Long Upper Elementary 211 Burks
Library
Art
Smith Primary 133 McCardell
Flynn Conrad Full-Day Primary 134 Miller
P.P. Mark Tucker
Office Manager
J. Denton
Head of School
Sick Room
Reception
Alford Lower Elementary Andrade-Salgado
Music
Boynton Full-Day Infant Community 137 Cornejo
Clarke Full-Day Primary 135 Armendariz
Garcia Home Environment 136 Chavez Onofre
Admission Director
Development Director
Business Mgr Asst
Business Manager
Turner Lower Elementary 139 Lopez
Elementary Before/After School Care
Judas Lower Elementary 213 Tran

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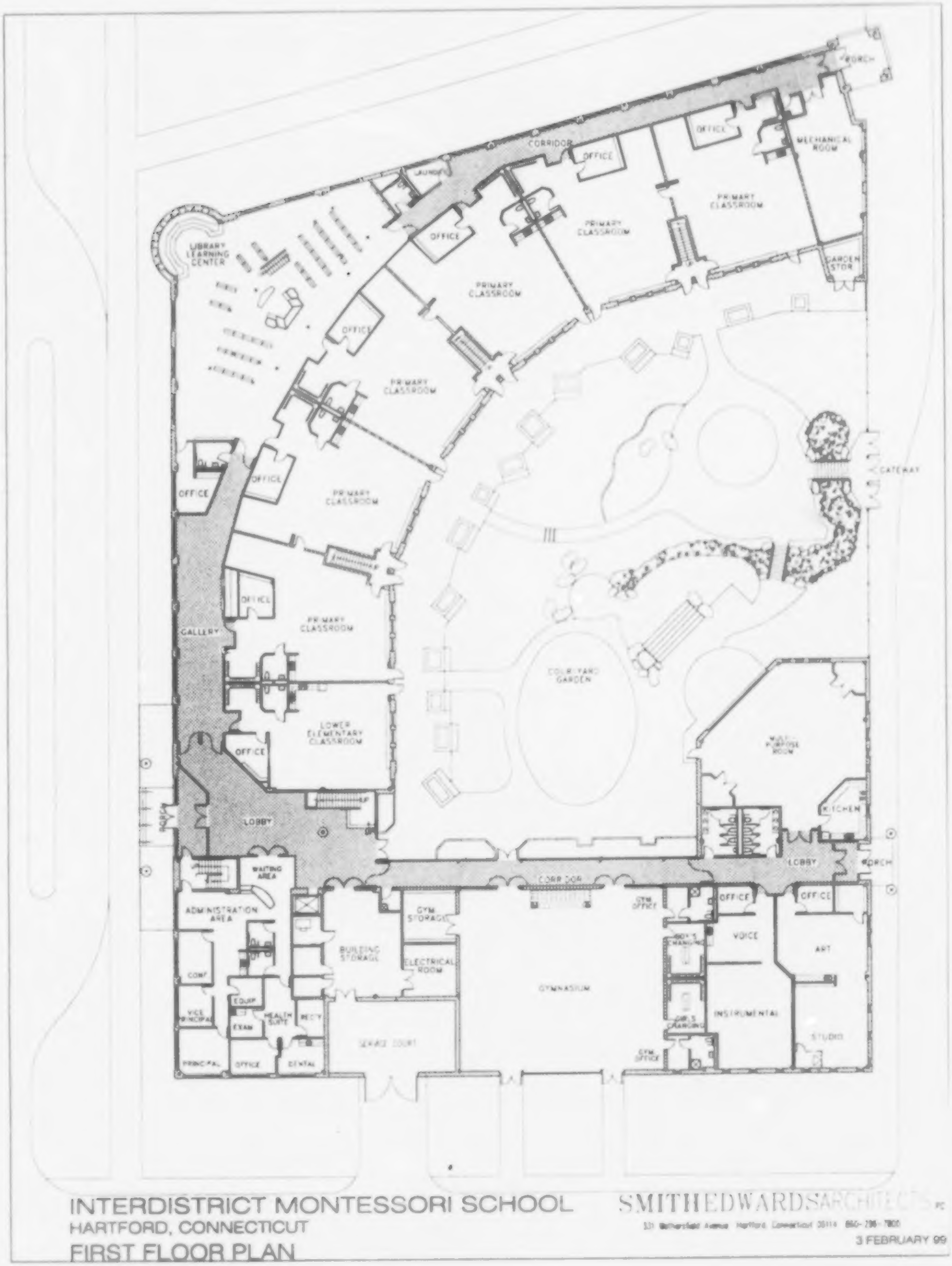
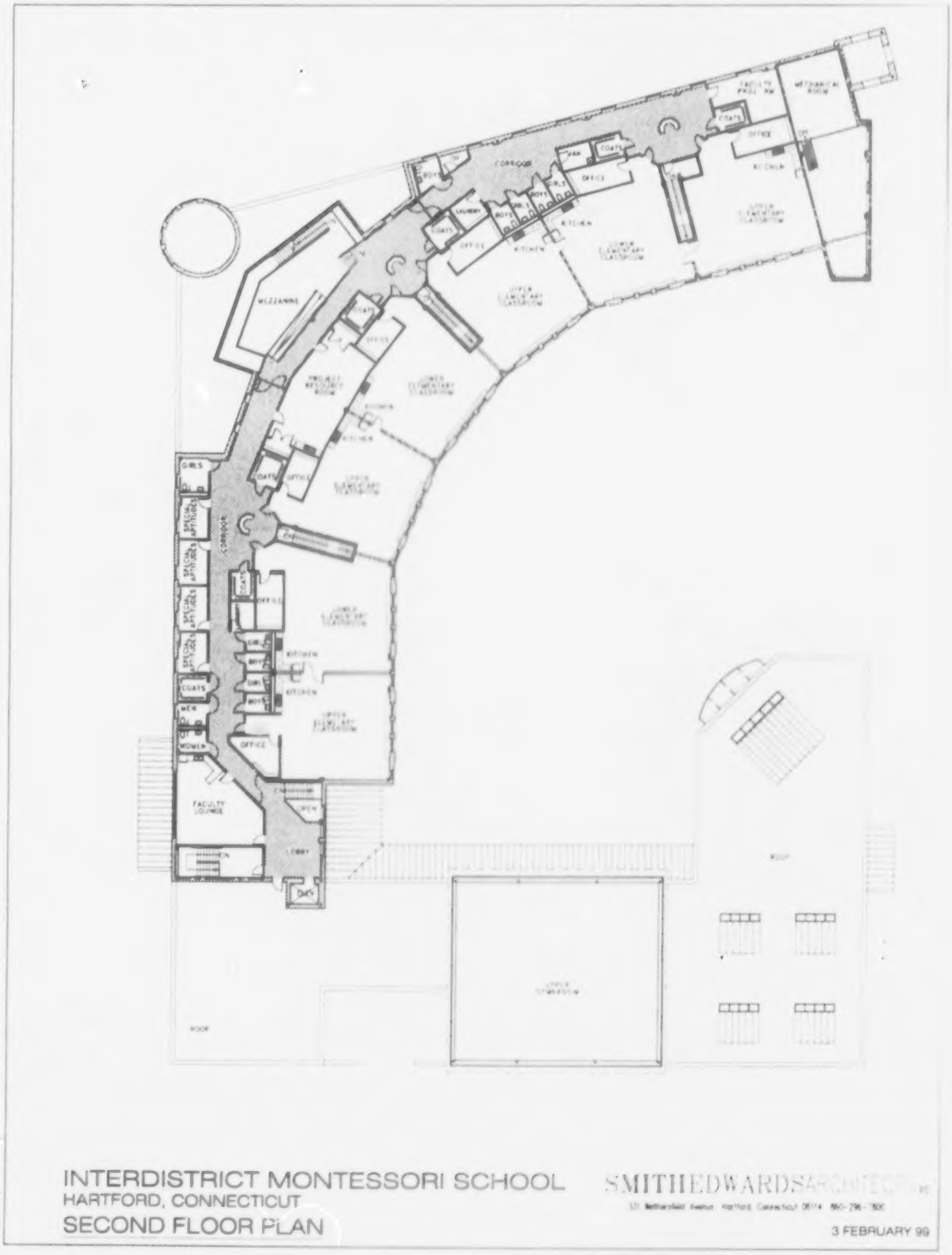
Floor Plan, The Post Oak School (Bellaire, TX)

First-Floor Plan, Interdistrict Montessori School (Hartford, CT)


PORCH
MECHANICAL ROOM
OFFICE
CORRIDOR
OFFICE
LAUNDRY
PRIMARY CLASSROOM
PRIMARY CLASSROOM
OFFICE
GARDEN STOR
LIBRARY LEARNING CENTER
PRIMARY CLASSROOM
OFFICE
PRIMARY CLASSROOM
OFFICE
GATEWAY
OFFICE
PRIMARY CLASSROOM
OFFICE
PRIMARY CLASSROOM
GALLERY
COURTYARD GARDEN
LOWER ELEMENTARY CLASSROOM
OFFICE
MULTI-PURPOSE ROOM
KITCHEN
LOBBY
LOBBY
PORCH
CORRIDOR
WAITING AREA
ADMINISTRATION AREA
CONF
VICE PRINCIPAL
PRINCIPAL
EQUIP
EXAM
HEALTH SUITE
RECY
OFFICE
DENTAL
GYM STORAGE
BUILDING STORAGE
ELECTRICAL ROOM
SERVICE COURT
GYMNASIUM
GYM OFFICE
BOY'S CHANGING
GIRL'S CHANGING
GYM OFFICE
OFFICE
OFFICE
VOICE
ART
INSTRUMENTAL
STUDIO
INTERDISTRICT MONTESSORI SCHOOL
HARTFORD, CONNECTICUT
FIRST FLOOR PLAN
SMITHEDWARDSARCHITECTS PC
3 FEBRUARY 99

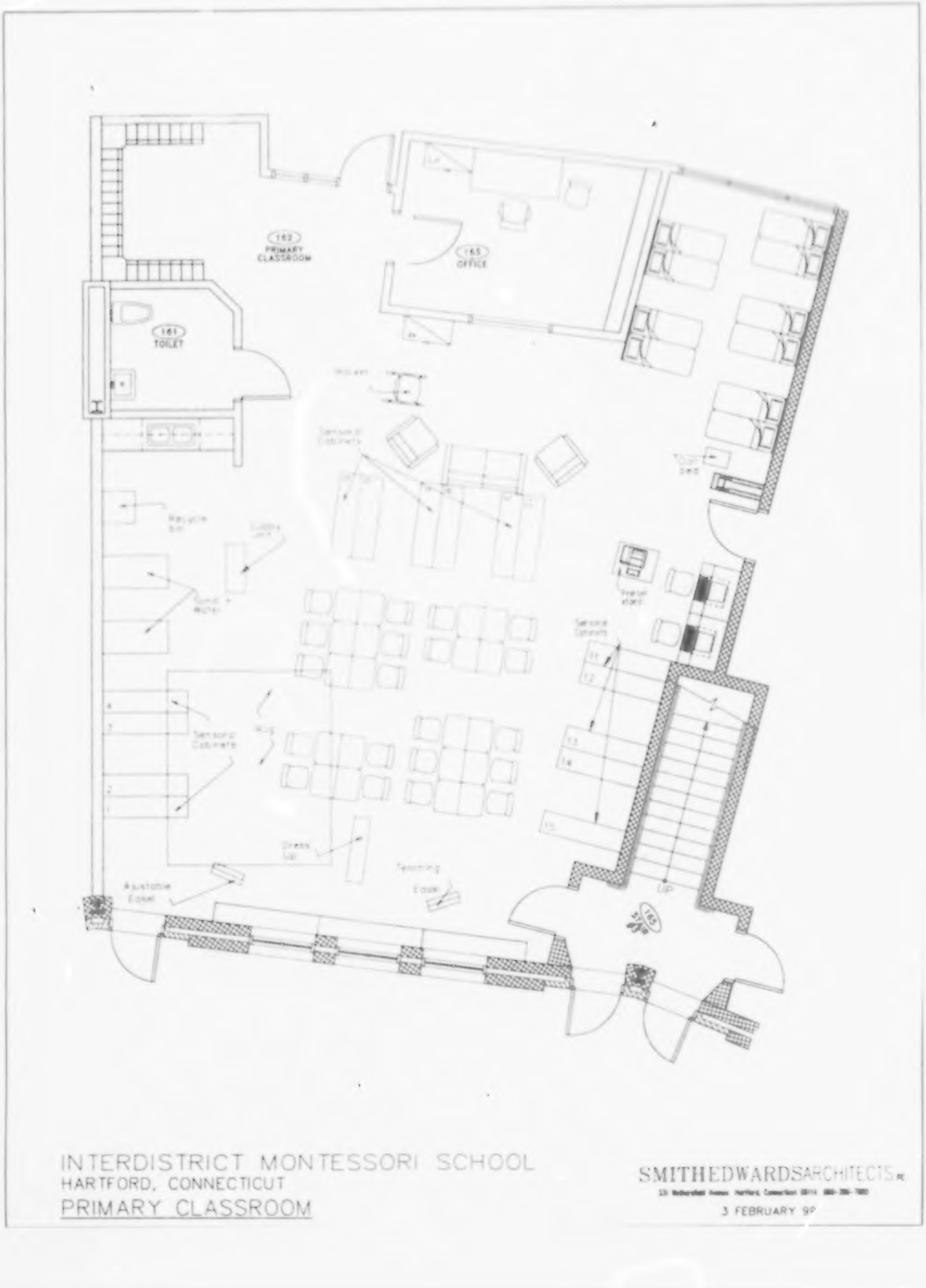
Under construction at the time of this publication, the Interdistrict site plan was designed with NAMTA's input. Classrooms are built on a curve, opening on one side into a courtyard and on the other into a continuous media center. Preschool classrooms, located on the first floor, are equipped with kitchens, coat rooms, offices, and a sleeping area for all-day Montessori use.

Second-Floor Plan, Interdistrict Montessori School (Hartford, CT)


CORRIDOR
MEZZANINE
GIRLS
BOYS
COATS
OFFICE
KITCHEN
SPECIAL APTITUDES
MEN
WOMEN
FACULTY LOUNGE
LOBBY
ROOF
INTERDISTRICT MONTESSORI SCHOOL
HARTFORD, CONNECTICUT
SECOND FLOOR PLAN
SMITHEDWARDSARCHITECTS
3 FEBRUARY 99

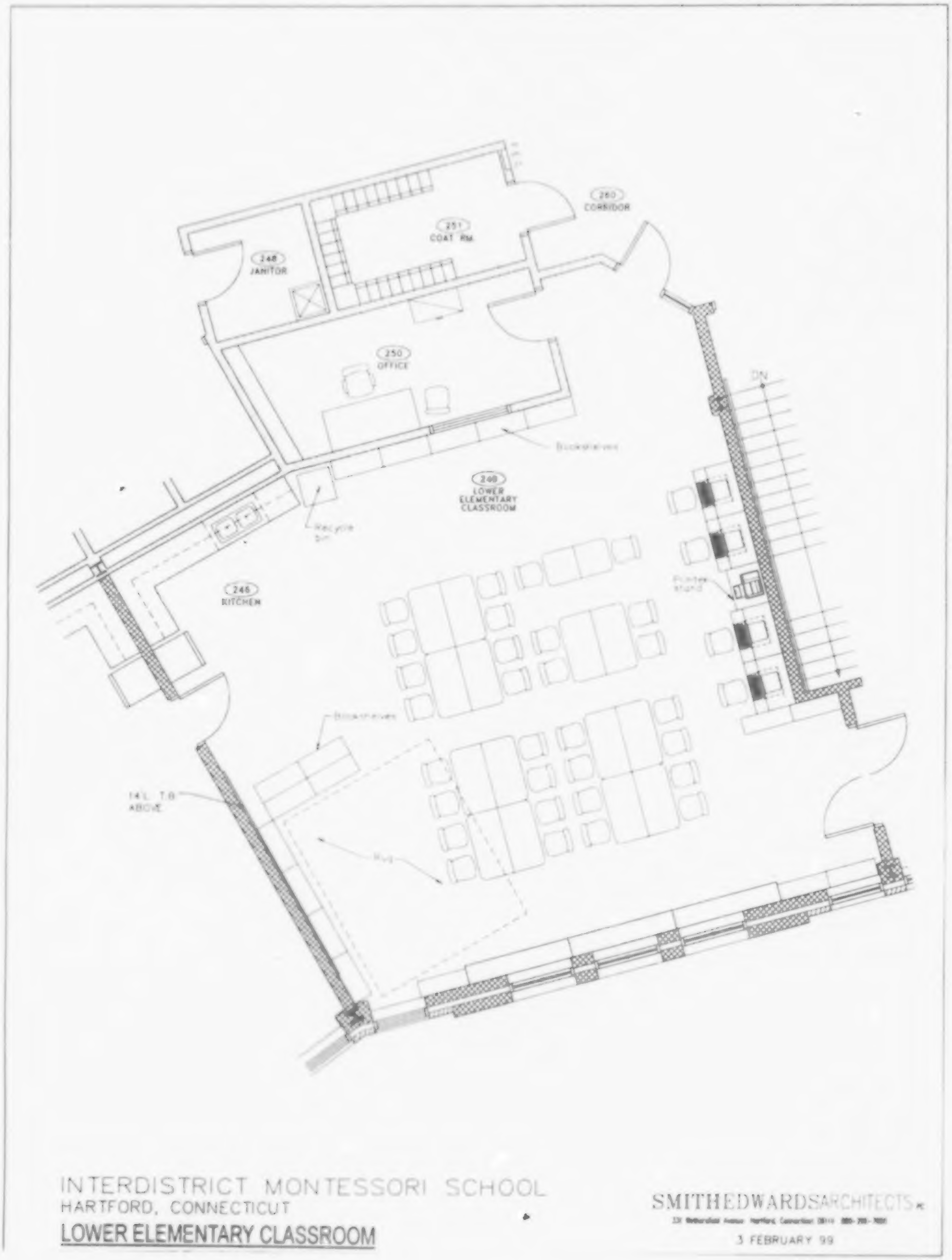
Second-floor classrooms open onto a project resource room and mezzanine with stairs leading down into the media center. Classrooms are all equipped with offices, kitchens, coat rooms, and computer space.

Classroom Plans, Interdistrict Montessori School (Hartford, CT)

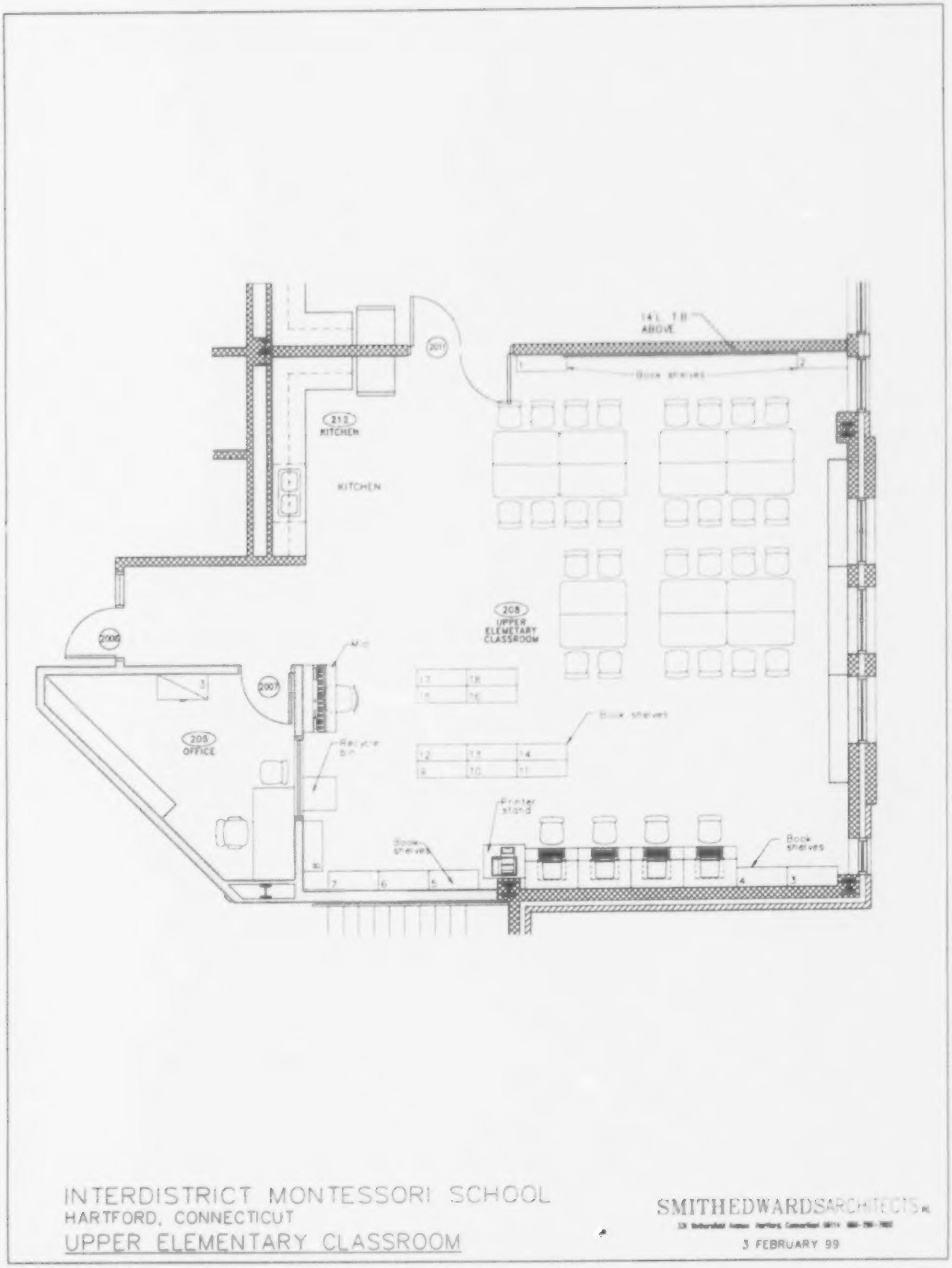

152
PRIMARY CLASSROOM
165
OFFICE
161
TOILET
Sensorial Cabinets
Recycle bin
Cubby unit
Sand Water
Rug
Dress Up
Adjustable Easel
Teaching Easel
Cot bed
UP
INTERDISTRICT MONTESSORI SCHOOL
HARTFORD, CONNECTICUT
PRIMARY CLASSROOM
SMITHEDWARDSARCHITECTS PC
3 FEBRUARY 98

Details of Preschool, Lower Elementary, and Upper Elementary classroom spaces. Furniture placement in individual classroom plans is architect's conception only and does not reflect actual seating arrangements.

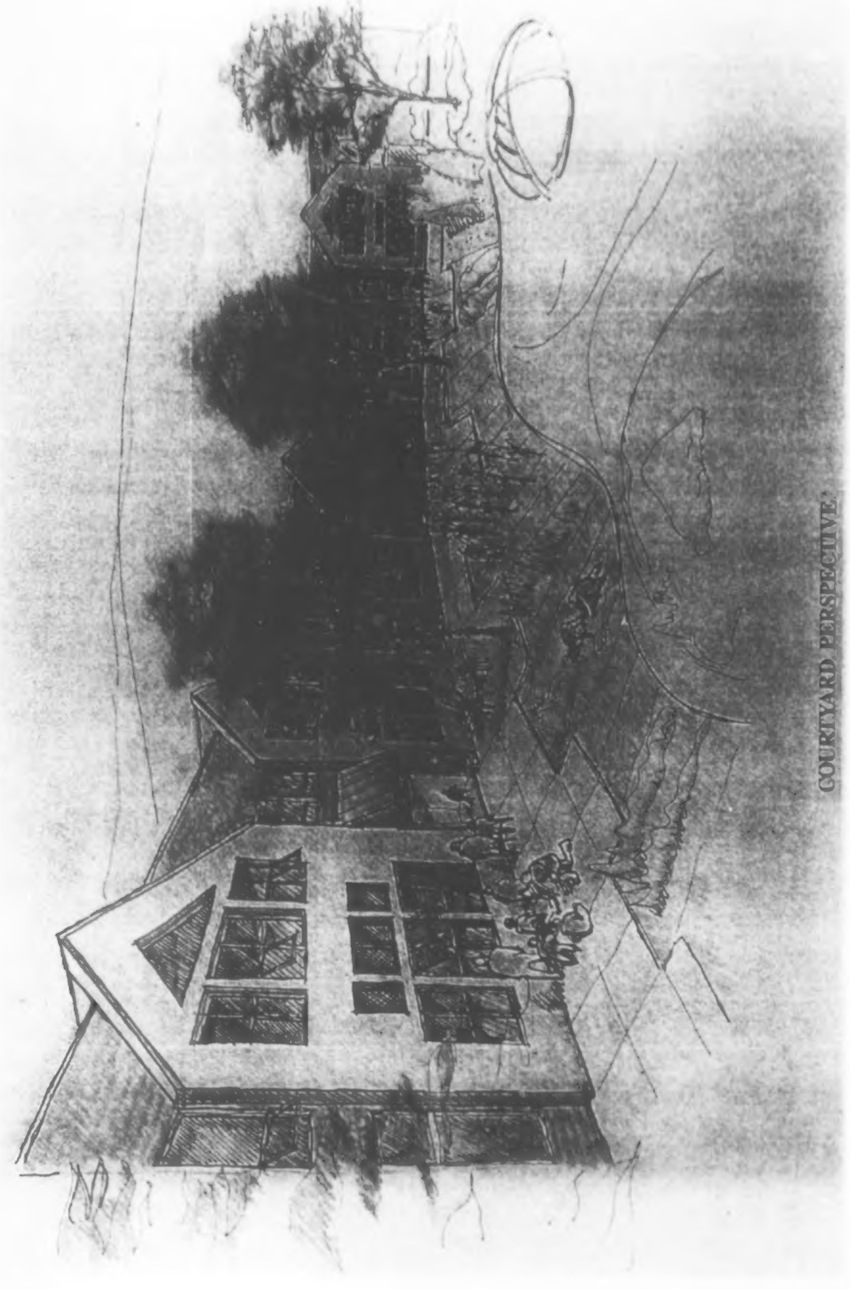
Classroom Plans, Interdistrict Montessori School (continued)


250
CORRIDOR
251
COAT RM.
248
JANITOR
250
OFFICE
Bookshelves
249
LOWER
ELEMENTARY
CLASSROOM
Recycle
bin
DN
246
KITCHEN
Printer
stand
Bookshelves
14'L. T.B.
ABOVE
Rug
INTERDISTRICT MONTESSORI SCHOOL
HARTFORD, CONNECTICUT
LOWER ELEMENTARY CLASSROOM
SMITHEDWARDSARCHITECTS PC
3 FEBRUARY 99

Classroom Plans, Interdistrict Montessori School (continued)

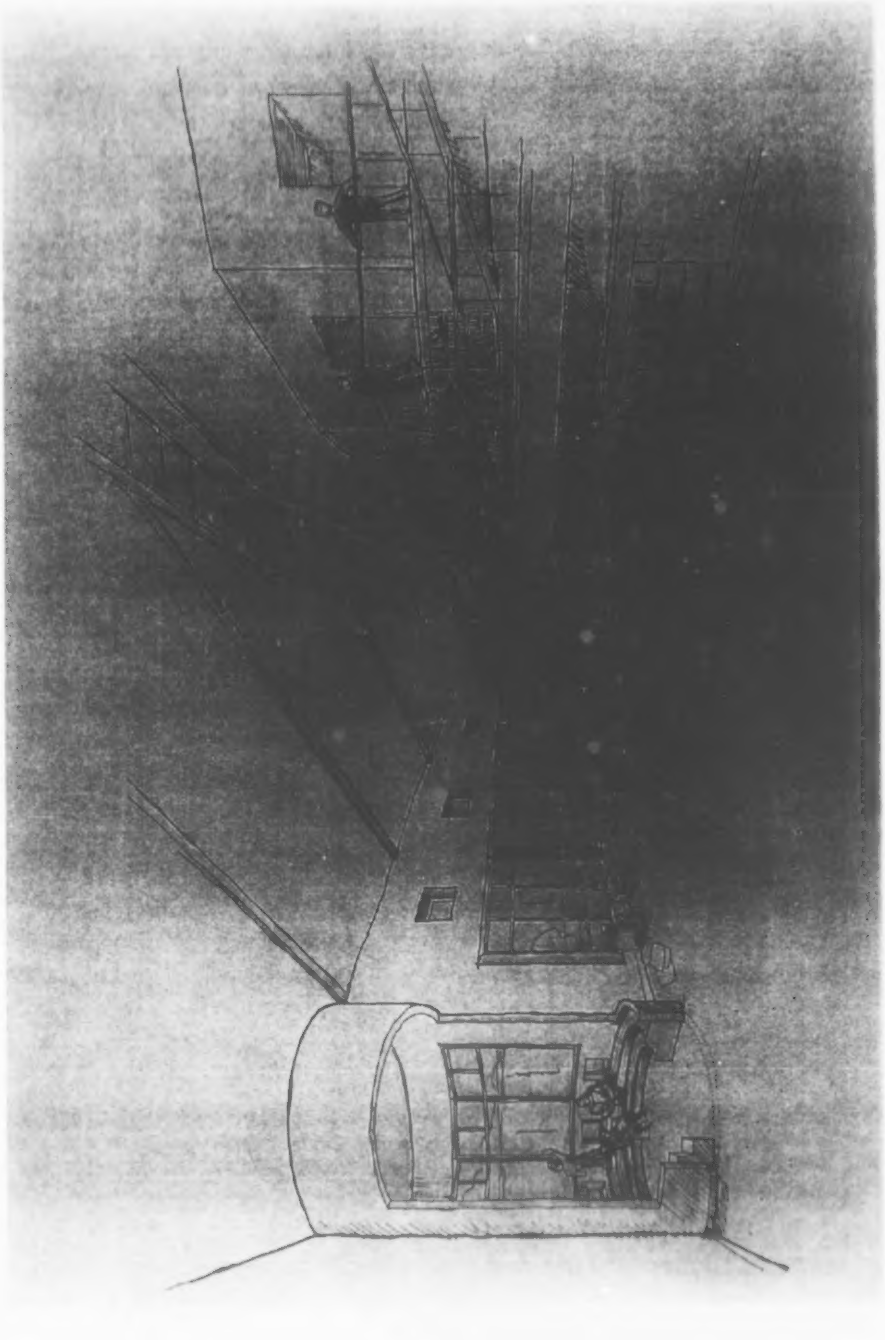

14'L. T.B.
ABOVE
Book shelves
1
2
2011
212
KITCHEN
KITCHEN
208
UPPER
ELEMETARY
CLASSROOM
2006
2007
3
205
OFFICE
Recycle
bin
17
18
15
16
Book shelves
12
13
14
9
10
11
Printer
stand
Book
shelves
7
6
5
8
Book
shelves
4
3
INTERDISTRICT MONTESSORI SCHOOL
HARTFORD, CONNECTICUT
UPPER ELEMENTARY CLASSROOM
SMITHEDWARDSARCHITECTS
3 FEBRUARY 99

Elevations, Interdistrict Montessori School (Hartford, CT)

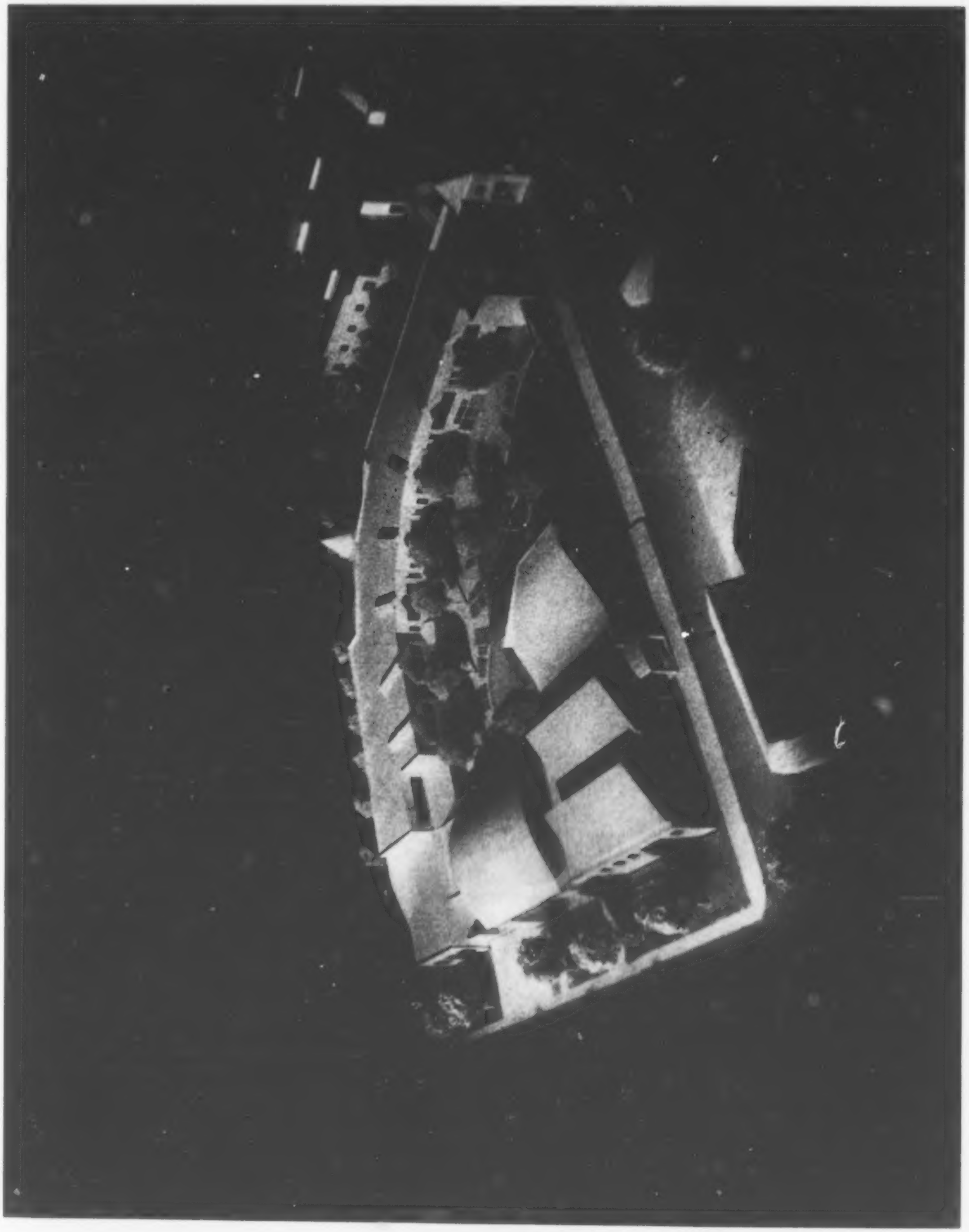


The courtyard perspective includes a *Casa dei Bambini* (House for Children) look, with pastel townhouse exteriors, giving the impression of a small village. The media center with upstairs mezzanine space creates a unified library, audio-visual, and meeting area where children of all ages can do independent research and study.

Elevations, Interdistrict Montessori School (continued)



Model, Interdistrict Montessori School (Hartford, CT)



The model gives a unified impression of the classrooms on a curve and the courtyard. To the left is the wing that includes the gym, multi-purpose room, and music and art spaces.

The Children's House

by Lili E. Peller

Lili E. Peller was a close friend of Maria Montessori. With the help of architect Franz Schuster, she designed the famous Vienna "Haus Der Kinder," an all-day Montessori program operating in Vienna in the early 1930s.

Here Peller is writing for a non-Montessori audience; her suggestions are therefore oriented in some ways toward traditional "nursery school" approaches. However, her keen understanding of play and her creative approach to the relationship between indoors and outdoors makes this article a valuable resource on the first principles of an all-day Montessori space as studied and refined by a first-generation Montessorian.

From Lili E. Peller, On Development and Education of Young Children: Selected Papers, *edited by Emma N. Plank. Copyright © 1978 by The Philosophical Library, New York. Reprinted by permission of The Philosophical Library.*

Introduction

> "We need in every part of the city units in which intelligent and cooperative behavior can take the place of mass regulations, mass decisions, mass actions, imposed by ever remoter leaders and administrators. Small groups: small classes; small communities; institutions framed to the human scale, are essential to the purposive behavior in modern society."
> (Lewis Mumford, *The Culture of Cities*)

We take it for granted today that "form follows function," as Louis Sullivan has said, or, rather, that good form crystallizes from use. The planner of a home should know well the kind of people who will live and work in the house he is to build. Our concern here is with the house where groups of active children will spend a large part of their day.

The house is a powerful agent contributing to the happiness or the strain of its inhabitants. There is no doubt that the teacher is the most important factor in nursery school. Yet even the most devoted teacher has a limited amount of energy and resilience. It depends largely upon the layout and the equipment of the house whether her working day is a long chain of drudgery and repetitious toil, or a sensible sequence of things which can be done with dispatch and ease.

Before there can be improvements in nursery school housing in a community, people with imagination and courage must visualize them. To achieve better schoolhouses, all the teachers who are professionally alert must become interested in housing. Then it may well be that ten years from now photographs of today's nursery schools will be shown with a smile, just as today we smile at grandmother's kitchen.

Looking at some photographs hence, it will seem unbelievable that the houses had been especially adapted and planned for children, and that groups of active youngsters were brought to these buildings and lived in them for eight or more hours daily. Indifference, pessimism, and inertia are our real enemies, not discontent with present conditions.

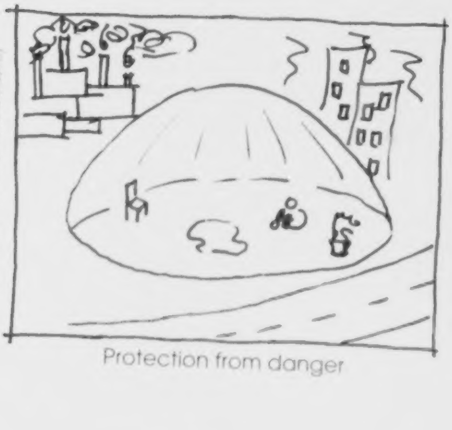
Modern engineering can help nursery school teachers. This means that we who work with young children must state comprehensively and in detail what group care of young children requires in a building. We, the teachers, cannot do it without the architect, the technician, the builder. Neither can they do it without us and our experience.

It is desirable that nursery schools develop in a direction that will fully preserve private initiative and personal responsibility. Kindergartens in public schools are today too often schoolish and regimented. They are more concerned with readiness for academic work than with the children's need for vigorous play. If cities would provide a number of buildings for nursery schools–possibly scattered over our city parks and along city river banks–and rent them to qualified persons or organizations, this would help tremendously toward improving standards without choking personal leadership. This plan is not revolutionary or unprecedented. Cities have long provided playgrounds for children. Recently these playgrounds have become more numerous and elaborate, including large sand boxes, wading and swimming pools (and many, often quite creative, opportunities for climbing, sliding, etc.), and simple rain shelters. In this way the community has recognized its responsibility to provide for children's play activities.

Today most nursery schools are housed in rooms, yet we speak here about "houses." This term is not a figure of speech. We hope that in the future many nursery schools will be in detached units, in pavilions. However, even in our Utopia many nurseries will be in rooms in larger buildings. These rooms will take their pattern, their standards, from the houses built for children.

Children's Needs Determine the Plan of the House

We want the children's houses to be small, unpretentious, and semi-permanent structures. The young child's needs are our guide in planning his house. He has the great urge to play; in order to play well he needs protection from danger as well as from unnecessary interference, and he needs judicious help. The young child should have surroundings which he can explore, understand, and use. He needs an environment which is a complement to his intelligence, permitting him to be self-steered, to use his abilities, to make a choice, and to make mistakes without endangering himself or others. At home the emphasis is necessarily on the things he cannot do for himself; in the children's house the burden of being small in size, weak, and impotent can be effectively lessened.



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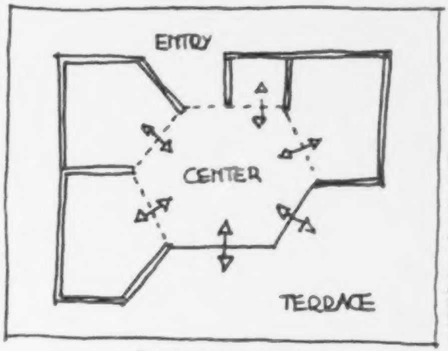
Protection from danger

Visiting a children's house in the evening after its daytime inhabitants have gone home, we can read "off the walls" the educational philosophy of the teachers. Some schools seem to acknowledge the two main functions of the nursery school as protecting young children from danger and giving them an opportunity to play with peers. Such a school needs shelves for toys and space for play and that is all. The children are not supposed to move freely among the rooms. The adult will call them to the door when it is time to go to the toilet or to go outdoors; she will tell them when it is time to rest and when to go from one room to the next. Thus, the knobs on the doors can be high. It is even advantageous to have them out of the children's reach. The teacher can give her attention to studying, observing, and recording the children's imaginative play. She need not worry about a child wandering away. The adult "takes" the children outdoors as a group and they come back as a group. The basic principle underlying this type of nursery school is this: Children should enjoy the maximum freedom in their play using materials and toys as they please. In issues pertaining to their physical welfare, the adult knows the child's needs far better and bids him what to do.

On the other hand, a nursery school centering its program around the children's need to play, as well as their need to gain an intelligent use of their environment, should have a building which enables the child to move from one room to another without asking the adult's help. All the rooms used by the children are connected by doors which the children can open. A cluster arrangement with a main room in the center gives direct access to all satellite rooms such as lavatories, workshop, cloakroom, kitchen, and quiet room. This arrangement also has the advantage of doing away with long corridors. Two, three, or four units can be housed under one roof. The rooms for the adults—office, kitchen, and staff room—serve the whole school. The outdoor play space should also be directly connected with the play room. French or sliding doors connect the play room with the play space outside (be it yard or roof), giving the teacher and children an unobstructed view from the inside out and vice versa. The plan of the house should be so simple and so compact that a child can quickly gain a sense of orientation and the teacher can give unobtrusive supervision to all rooms while being in one.



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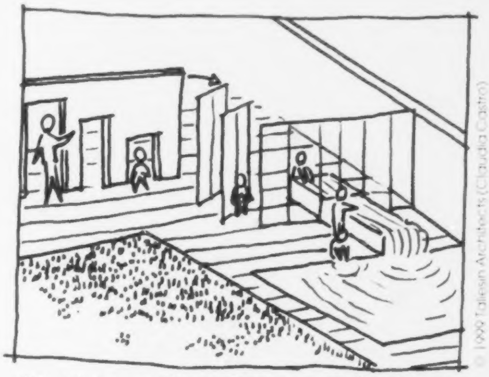
Free movement



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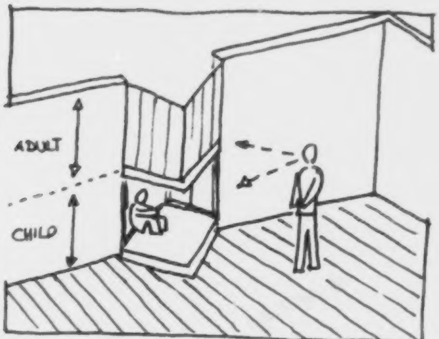
Direct connection of indoors and outdoors

The children whose nursery day is longer than three or four hours need several rooms. For the child who comes for a half-day only, the company of others is the main need; but if he comes for a longer period, privacy is as important as company. Both are needed for social and emotional balance by children no less than by adults. It seems hardly necessary to say that the seclusion must be self-sought in order to give the child relaxation and serenity. The main room may have alcoves or nooks which can be partitioned off with a sliding door disappearing into the wall when not in use, or with a door of transparent plastic. Transparent doors do not cut off the child from the group yet give him quiet if he wants to look at picture books, to rest, or to play with only one or two children. Or an alcove can be used the other way around–to protect the majority from the noise of the minority. With the carpenter bench in there, the lusty hammering and sawing need not disturb the other children. There is a notion that young children are mob-minded and that when given a chance, they will always flock together into a big noisy crowd. Observation of children for whom the company of other children is nothing new disproves this; they often like to play in very small groups.

The Young Child's Adventures in Space

The qualities of space–the feeling of spaciousness or of nestling in a small enclosure, the sensation of being high up and looking down–are a source of delight for the young child. Children love a wide-open place where they can run with abandon; they like to huddle in a corner or under a table covered with a blanket, or to sit squeezed in a dolls' house. The more cramped and crowded the quarters, the greater the enjoyment can be. The adults' attitude toward space is usually quite utilitarian. They cannot derive from spatial perceptions, as does the young child, the joy and the whole gamut of sensations. If children were studying adults, they would put into the textbooks that most adults are "color blind" in regard to space.



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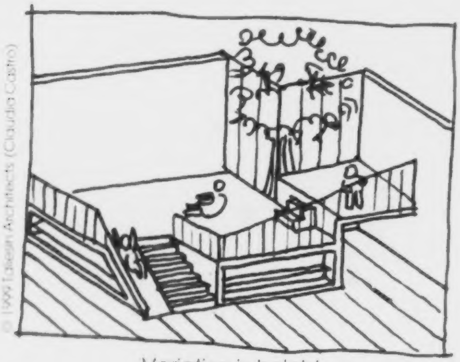
Open versus small spaces



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Variation in height

Children like to be high up and look down on objects and places which are familiar. Every nursery should have a kind of balcony or, as we like to call it, a "treehouse" in the play room. The young child enjoys climbing, and he should have ample opportunity for it inside the nursery as well as outdoors. The raised balcony also gives a chance to get away from the group and, last but not least, it adds a number of square feet of play space.

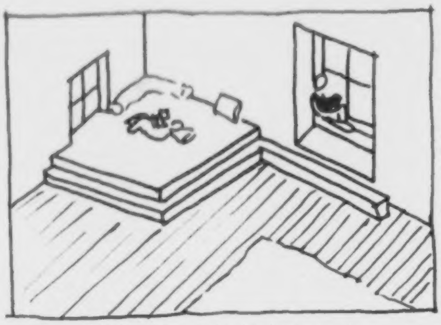
Good treehouses can be reached in various ways: by a ladder, a rope ladder, or notches cut into the wall. The child can leave the treehouse also by means of a slide. Each approach presents a different hurdle to the child. He may have to crawl into the treehouse through a narrow opening or climb over a couple of rungs. Children are so taken with this "adventure in space" that they will take the trip many times in succession.

There are spatial experiences the young child cherishes. The nursery school can offer many as the average home cannot. One school has one side of the stairway a slide instead of a banister. It seems superfluous to describe the delight of the youngsters, but we might mention the skill they acquire and point to the clever principle of making legitimate a pleasure which generations of children could obtain only by stealth. Of course, the stair must have a certain incline and the landing at the bottom should not interfere with other traffic in the house. Swinging up and down, gliding down a slide, climbing on the jungle gym and ladders or on a tree with low branches, constitute the more thrilling "adventures in space." The physical exertion, the sense of daring, add to the experience of space as a medium.

The Room

Floor

Today the usual arrangement is to leave one side of the room free or to keep the center part of the room unencumbered. It would seem better to provide several decentralized floor areas. A part of the room can be elevated with one or two steps. The very young child loves to practice walking up and down, and all children love to sit on steps. Besides the steps leading to the platform, there might be a step leading up or down to one of the alcoves; or an alcove might be separated from the main room by a doorsill high enough to serve as a seat for a child. A good place for stationary steps is underneath a window. The children enjoy standing or kneeling there and looking out. Platforms, balconies, steps, and ladders are variations of the theme "floor." At this point, we might suggest the use of a soundproof ceiling to reduce the noise level.



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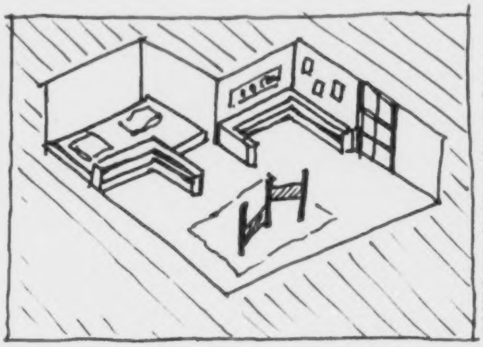
Platform and window seat

Walls

No matter how one plans a room, one will always desire more wall space. The main nursery room is simultaneously a workshop and a display room, so wall space is needed for a number of purposes. Low screens and protruding shelves, variations on the theme "wall," help to subdivide the room and give a certain degree of privacy to groups of playing children. If many children eat in one room, screens may serve as partitions to form a number of booths. They can also be placed to help direct the traffic of children who carry plates and food back and forth. Encouraging children to help in this way allows them a legitimate opportunity to break the strain of sitting at the table throughout the entire meal. At rest time the setting up of enclosures giving privacy is even more essential than at meal times. At play time the children will soon discover that screens can create various enclosures or may even become part of their play equipment on occasion.



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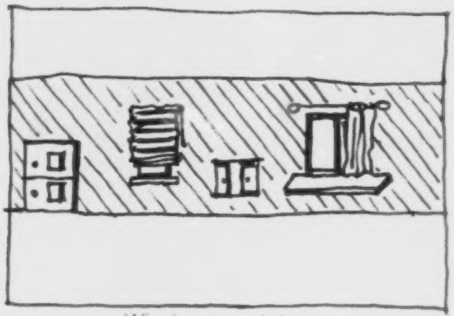
Low screens and shelves as walls

Windows and Doors

Windows admit light and their coverings (blinds, curtains, or shutters) diffuse it. Both are needed at different times of the day. The room will usually be darkened for rest period. Occasionally a darkened room may set a better stage for story period or for the game of "listening to all the little noises." A southern exposure and a bright orange or blue curtain will, when the curtain is drawn, fill a room with color and subdued light–a pleasant and quieting effect. In a one-story building a skylight of plain or colored plastic will admit additional light. Children love to look out of the window. This function of windows is as important as the admission of light and air. We must remember that the motionless child who is listening or gazing with all his might is mentally a very active person.



Windows and doors

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Children like the experience of opening and closing a window. In homes this is usually a privilege reserved for adults. A nursery school window may have one or two small panes for the child to open without endangering himself.

With little expense a door can be inserted in the doll corner or a gate can be installed on the playground or indoors. One door can be constructed as a Dutch door, i.e., it is divided and the upper and lower parts open separately. The amount of experimentation, that is the alternate opening and shutting of the upper and lower part, indicates how much learning goes on in relation to "open" and "closed," or "connected" and "separated." After a time the playful repetitious handling gives way to an intelligent use at the appropriate occasion.

Children also love to pass things through an opening in the wall which can be closed with a door sliding sideways or upwards. Such a counter window with a shelf on both sides may be permanently useful in connecting the children's room with kitchen or workshop. The child who manipulates the Dutch door or the counter window establishes contact or withdrawal between himself and others. Here the perception of spatial relations and of social relations intertwine. This may explain the fascination which these gadgets hold for the young child.

In planning the house we also should remember that water is an essential plastic material. There should be at least one low faucet with sink and drainboard in the main room.

Indoor Furnishings

Several nursery school manuals give good detailed descriptions of the sizes and proportions of chairs, tables, and shelves, the main pieces of furniture. Usually chairs and tables in a nursery group are of two different sizes. This is a commendable practice although it does not always lead to our goal, namely to provide each child with a comfortable seat. Children will draw a higher chair to a lower table, and some children will always hunt for the larger-sized furniture, although they cannot put their feet down on the floor when seated. The prestige of being taller apparently more than compensates for the discomfort. As the children do not remain seated for long periods, this does not matter and the teacher need not interfere. It is not advisable to use different colors for the different sizes of chairs and tables. This will only make the larger furniture more conspicuous and more coveted. The light weight of a chair is important, for the child likes to carry a chair to different parts of the room or outside.

A nursery for 20 children requires 20 seats, but not all the seats need to be identical. Straight chairs, rocking chairs, armchairs, small stools, straddle-seats, a bench, and floor cushions (hard cushions covered with oilcloth or plastic) give variety. Some chairs will be more appealing than others. The variety will lead to little squabbles among the children. A child who never would have cared for the armchair will become eager to sit in it when he sees how much another child treasures its "possession." The ensuing negotiations, pleading, or violence are important social experiences and necessary in group adjustment. Chairs may be painted in two or three pastel shades or some may be polished wood or aluminum (plastic chairs have excellent contours and are less heavy than wooden ones).

Only in our western culture have we given up squatting or kneeling positions which bring us nearer to the floor than the average chair. Children like to sit tailor fashion on the floor, or to kneel on a flat cushion, sitting on their heels as the Chinese do. Both positions are healthful for the child. Flat floor-cushions match low tables, some of which may have hinged tops to prop up for painting and drawing.

Tables, too, should not be uniform. The majority will be the rectangular type seating two children. In addition, there can be a large table for 8 to 10 children. Large and small tables have their specific advantages and disadvantages. Large tables facilitate supervision. A group of children, each one working with the same material (clay, fingerpaints, paper) or on a joint project, is better off seated at one table. Interest is contagious and the enthusiasm of one child spurs the others. Individual tables discourage copying a design or a clay figure. Round or half round tables are practical for meals. They take up more space but the number of children seated at one table is more flexible. One table may be a drop-leaf table, or a small table can be hinged to the wall and dropped when not in use. Incidentally, silence domes [rubber tips] on all table and chair legs are an asset.[1]

The variety of chairs and tables plus the fact that some may be taken apart or folded instigate the child's interest in these parts of his daily environment. His attention is drawn to those qualities which constitute the "chairness" of a chair or which are indispensable in a table. The child's discovery is a source of great joy. Soon he tries his hand at making a table or a chair out of large blocks or empty boxes. This shows initiative and intelligence.

The youngster who takes two pieces of wood, nails them together, and calls them an airplane can be sure to get recognition from his teacher. Yet his intellectual accomplishment may be very small. Few teachers are equipped to see this. Their perceptiveness is geared to achievement resembling the work of an adult artisan or artist. There are glimpses of intelligence of another order. The child observes, compares, and by some kind of short circuit, discovers that things can

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[1] Some Montessorians would argue that the use of rubber tips on furniture eliminates the control of error for moving furniture gently and quietly.–Ed.

be put to a different and new use. The more children are accustomed to help themselves and not wait for adult assistance, the greater the probability of such discoveries.

We stop here to assert that educators who want the younger generation to accept conventions without questioning have no reason to foster an experimental attitude towards chairs and tables in early childhood. If we consider it the task of education to fit children into existing molds, then it is logical to expect the child to use each piece of equipment in the conventional way and to make it clear that any other use is a misuse.

Our goal, though, is flexible and sensible use of all equipment. Most pieces of furniture can be used in several ways; they also can be abused. The child who is encouraged to observe and to experiment will soon be able to differentiate between use and abuse. All furniture for young children should be sturdy and well built, and a certain amount of breakage must be expected. Children who are with well-liked adults and who take an intelligent and active interest in their surroundings will rarely be deliberately destructive even when they are on their own.

All material and toys should be accessible to the children without their asking the adult's help. Here again is the recurring theme: The nursery school should lessen the discouraging burden of dependency which in our culture is heavier than in others. The primary purpose of all equipment, toys, and furniture is to provide an arena for the child to build intelligence, imagination, initiative, perseverance. Another important reason for making tools and play materials directly accessible to the child is that a young child's intentions or plans are not well defined or fully conscious. He cannot put them into words with ease or precision. The layout of the nursery school enables him to translate into action impulses which are vague and fleeting. This, too, is part of the "self-expression" offered in nursery school. To emphasize this point, we make a corollary statement: A child for whom verbalization of what he wants to do no longer presents a hurdle has passed the stage where he belongs in a "nursery."

The order of the room should be simple and easy to remember. The child has a feeling of ease and competence when he knows where to look for a thing. Our direct guidance is a burden for him; our subtle, indirect guidance gives wings to his conquering steps. Thus, we will take as much effort to display things attractively as a good storekeeper takes with his wares. The color of the open shelves should be neutral and unobtrusive in order not to distract attention from the bright-colored toys.

See Appendices 1-3 for information on appropriate classroom materials.

Too many things are confusing. The child cannot find quickly what he wants, so he gives up and turns to the adult for help. He feels the burden of his own inadequacy. Only functional things have a place on the shelves in a room of active children. Toys or materials which have not been used for some time by any child should be removed. It may be advisable to remove them permanently, or to bring them back after a few weeks, placing them in a different spot.

Some teachers follow a definite "hands off" policy. They ignore youngsters who mill around obviously bored and mentally undernourished. Other teachers are quick to spy an idle child and make alternate suggestions. We believe that a good deal of idleness is a prerequisite for plunging with whole-hearted interest into the next enterprise. If we interfere with the valleys, we will have no peaks. Before resorting to a verbal and direct proposal, the teacher should try an indirect appeal through a piece of equipment.

For children who are accustomed to find their materials in plain sight, things which have to be taken from a closed cabinet or from behind a curtain have a special attraction. Toys kept in a cabinet locked with a key have a particular appeal. Most young children are fascinated with a key which they can insert in a keyhole and afterwards return to its hook on the wall. Of course, a key which is so freely accessible to a group of youngsters will sometimes get lost, or be taken home by a child. One may argue: Why should the teacher add another concern to her full day? There are so many things children like to play with, would not the teacher do better to concentrate her effort on satisfying the children's emotional needs? We do not say that a preschool child who has no chance of handling a key is deprived of an essential experience. Yet he does miss something. The more all "perishable" items, anything that can be lost, soiled, or pocketed, are removed from the children's reach, the more grows their destructiveness. The teacher who looks for help in stemming the tide of carelessness which requires "eternal vigilance" on her part, will usually try to eliminate more and more things which can be broken, swallowed, taken home, or ruined in some way. But sometimes the opposite approach is more helpful; children are delighted when trusted with "special" things.

It should be possible to move almost everything outdoors–chairs, tables, shelves, screens, and easels. Often the children are glad to do most of the moving; after acquiring a certain amount of experience, the planning can be theirs, too.

The teacher needs someplace where she can keep things not intended for the children. A regular desk takes up too much precious floor space. We have found a cupboard receding unobtrusively into the wall a very good solution. In a room for a group of active children, an adult's furniture should not take up space. While we feel this way about a desk, we would like the teacher to have a comfortable chair where she can sit without cramping her knees. Her work is physically tiring. She is on her feet for many hours. A few minutes' relaxation in an easy chair can do much to restore her resilience. When she leans back in her easy chair, her eyes are at the level of the children's eyes. She has a better vantage point for observing the active community than when she stands up and "looks down" on them. But the teacher's big chair is even more important as a haven for the children. It is a special treat to be invited to sit there and look at a picture book, or an upset child will snuggle into the chair and watch the others for a while from a safe distance. As a rule, at first a child is fascinated with all the furniture which is just his own size, but the sight of so many other children may be frightening. In this case the big chair carries the message that there is a comforting adult in the room. A comfortable chair should be part of the standard equipment in a place where children and an adult live so closely together. Of course the teacher will take on her lap a child who asks for this either by word or deed. However, when she is too busy with the group, then sitting in her chair is the next best "ersatz."

The room can become the teacher's most valuable assistant. The teacher who wants to give her group a great deal of freedom yet does not want this freedom to degenerate into chaos, and one who wants to make her guidance more and more subtle, will find that time spent with the room and equipment pays ample dividends in improving her work. The teacher has to feel comfortable in her room and it has to satisfy her aesthetic sense. The color scheme makes the room pleasant and cheerful for children and adults. We think that children's color preferences should be carefully studied. Colors certainly stimulate or have a quieting effect. (The effect of colors would be a worthwhile study in an experimental situation where the setup would allow comparison undisturbed by other factors.) Strong colors should be reserved for those things which we want the children to pick up and manipulate, e.g., toys and tools. For tabletops, walls, shelves, and other large surfaces, neutral colors are more advisable.

In arranging the room, one will, as a rule, put all the materials used at one time in one corner or along one wall; under some conditions a certain amount of decentralization might be preferable. Frequently all the children's lockers for wraps will be in one part of the room. Yet there may be less general rushing and pushing if the lockers are in two places. Experience shows this may also be true for building blocks. When blocks are stored in two distant parts of the room, groups of children playing independently will be less disturbed by one another.

Outdoor Equipment

As mentioned before, the playground should be directly connected with the main rooms. The ideal schoolyard offers not only space for running and apparatus for climbing, swinging, and sliding, but also several areas or, as we may call them, "rooms," with varying degrees of openness. The yard itself should either be partly hard-surfaced or girded by a paved walk for tricycles, roller skates, and other wheeled toys. The hard surface has the advantage of drying quickly after a rain. It has the disadvantage of harder falls. The ideal surfacing for children's play yards remains to be invented (though rubberized concrete and tanbark are good solutions under climbing equipment).[2] Part of the yard should be shaded by trees. A pavement of hardwood bricks or rubber is good, but the expense is prohibitive. Children spend long hours at the sandbox and it is desirable to have it shaded in the hottest part of the summer, yet every sand pile must at intervals be exposed to direct sunlight.

In warm weather an area for water play is indispensable. A tube for crawling through and a jumping board are both desirable. New pieces of outdoor equipment are being tested in various housing developments. Some lend themselves to imaginative play. Although a good selection of outdoor equipment is available today, an observant teacher will be able to pass along valuable tips to the manufacturer.

Blocks, pegs, planks, and tricycles are heavy and cumbersome and should be stored directly on the playground. A simple large bin with a padlock will do, yet a child-sized playhouse which the children can use in their play with a storage space on one side is better. The flat roof, surrounded by railings, can be accessible with a ladder.

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[2] Many new safety surfaces have been developed in the past few years, including some that are hard enough for rolling wheels or bouncing a ball.–Ed.

Concluding Observations

It seems that the public takes more interest in nursery education than formerly. If true, this may be ascribed to a kind of escapism. That is to say, an audience may be more eager to listen to problems concerning little children to escape temporarily from problems of a badly muddled adult world. We have seen evidence of this interest and we should not let it dribble away in sentimentalities. We must channel it into concrete action to achieve the well-planned modern school which can provide an environment which is a complement to the child's intelligence (whether he is three or thirteen) and which can give him the opportunity to develop the independence so needed in our society today.

The Family and the School

With the structure of the school established, communication of its mission and general services must now become specific. Promotional materials make known the standards and quality of Montessori education at the school. The admissions and enrollment process becomes the initiation into the school community and involves all tangential activities between school and family. If the initial relationship between school and family is carefully documented and involves good human relations between head, teacher, child, and family, then this is the the basis on which to build Montessori education.

The most effective connection between parent and school is found in the continuing education of parents about their children and about their role as primary educators, based on a new definition of education invented by Maria Montessori and implemented by the Montessori school. Montessori's message is materialized through home visits, class orientation meetings, discussion groups, curriculum overviews, transition meetings, etc. These parent education events provide an interactive medium, which guarantees that both the child and the adult find security within the school community.

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School Promotion and Recruiting

Introduction: Good Public Relations Means Good Communication

Once the parameters of place, program, and finances have been established, the school must make contact systematically with the outside world. Communications include everything from the first news passed on through word of mouth to the formal design of letterhead to the preliminary brochure. Communication is an all-encompassing process; the board meeting, the parent conference, the ongoing long-range plan, the weekly newsletter, the financial reports, curriculum documentation, the parent handbook are all manifestations of communications that allow for a thriving, connected whole.

From the start, school communications are a necessary extension of school business for the simple reason that enrollment and retention of students is the basis of all revenue. But revenues are not the only reason to aspire to a healthy enrollment: The larger the enrollment, the greater each child's choices for socialization. On the business side, if the school experiences low enrollment or high attrition, it must objectively address the perceptions of the public and of the insiders and find out why it is unable to establish a steady population. This review of market factors can be done through exit interviews with every family that leaves before completion of the program (see the attrition survey in Chapter 8's Sample Documents). Surveys and/or phone interviews conducted by an outside professional reveal just what people are thinking and saying about the school and can inform the design of future marketing.

Marketing and program reform go hand in hand. If a school tries to cover program limitations with artificial promotional material, the shortcomings will soon be discovered. Integrated with a long-range plan, marketing can substantially change the image of the school by really addressing its weaknesses, both real and perceived. A published long-range plan can be an important promotional piece.

School improvement should be part of the school's ongoing communication. Curriculum upgrades, better specialty integration, an improved all-day Montessori program–these types of improvements can generate interest and excitement in the school community. A school should avoid a rut, yet stability is defined by having some constancy of programming. Therefore the balance is to be found by improving where improvement is needed while making it clear that the school is stable and has a secure base for its program and operations.

This chapter will focus on printed promotional materials that can help in developing a school image just prior to admissions. But the best promotion of all is word of mouth; there is no substitute for a school's good reputation.

School Brochures and Admissions Packet

Although marketing experts would disagree, the general convention in Montessori school brochures is to "go cheap." Some schools do choose to spend lots of money, but many parents who are looking for qualitative values in education are more suspicious of elaborate publicity than impressed by it. Nevertheless, the thoughtfulness and completeness of a school's profile in readable, attractive form could make all the difference. Careful proofreading is a must. No matter how attractive or "slick" a school brochure appears, a typo or spelling error can discredit its message to parents.

See Chapter 2 for discussion of nondiscriminatory admissions procedures

From a legal standpoint, fair representation of school activities in the school brochure is considered part of the contractual relationship between the institution and the persons who rely on those representations. The school's nondiscrimination or affirmative action statement should be expressed in the brochure or catalog.

Often the first promotional piece sent to an inquiring parent is a small introductory brochure. One kind of quick-read brochure announces open houses and/or recruitment meetings for the year (see Rock Prairie Montessori School's brochure in Sample Documents). Another gives a brief overview of the school in four pages or less (see Sample Documents from The Montessori Community School and Forest Bluff Montessori School). The idea is to capture the interest of the prospective family without a huge investment, and then provide a more elaborate admissions packet for those requesting an application (see Lake Country School's admissions packet in Sample Documents).

An admissions packet often includes the following:

- Application
- School's most recent annual report
- Schedule of tuition and fees

- Information about annual giving and/or volunteering expectations
- Letter of introduction from the admissions committee or director of admissions
- Overview of the school: address and phone number, mission statement, statement of philosophy, program characteristics, biographical sketch of Maria Montessori, recommended Montessori reading, photos of children using Montessori materials, non-discrimination clause, map showing location, FAQs, Montessori affiliation, etc.
- Material about each age division of the school (infant/toddler, preschool, elementary, adolescent)
- Admissions procedure

Networking and Outreach

Networking within the community is indirect advertising. Making oneself known in the community is a school's most precious promotional asset.

Local Montessori Community

Montessori schools within a community generally take on an attitude of cooperation, not competition. To promote the feeling of collegiality, the school should first and foremost introduce itself to other Montessori schools in the community. This type of contact can lead not only to referrals but perhaps even to a joint marketing effort. A city directory of Montessori schools is certainly appropriate for urban centers. National Montessori directories make schools nationally and locally aware of one another. Two or three schools might want to do a Montessori awareness week locally.

A school listing in *The NAMTA Directory* is an inexpensive way to make a school known to the national Montessori community as well as to hundreds of parents looking for a school. In addition, the entire Directory is posted on NAMTA's World Wide Web site, with links to school Web pages.

Community Partnerships/Enrichment Sources

A school can plan joint events with well-known community agencies such as museum education departments, cultural centers, athletic centers, libraries, parks, etc. School staff can be made available as speakers to other organizations, high school or college classes, etc. Collaboration with different family and child social and psychological services can happen easily around a child development speaker series or a parent discussion group.

See Chapter 8 for more parent education ideas

Private-Public Sector Exchange

Parent education and staff development events can be coordinated between private and public Montessori schools. Such events can open up opportunities that either school by itself might not be able to offer while at the same time increasing the schools' community visibility. In addition, NAMTA offers a range of materials schools can use for promotion, recruiting, orientation, and/or parent education, including booklets, slide shows, and videos. Particularly useful as an introduction to Montessori are the booklets *What Is Montessori Preschool?* and *What Is Montessori Elementary?*, as well as their accompanying slide shows and videos. See NAMTA's current Services Handbook for prices and ordering information on our full Parent Education Tool Kit.

private schools that serve as models for public-school Montessori programs can use this service role to attract funding that might not otherwise be available.

Publicity

Publicity in print and broadcast media is not necessarily reserved for schools that can afford to pay high advertising fees. A surprising variety of free publicity is available to those willing to invest some work and creativity. The chamber of commerce in most cities publishes a "media guide" that lists all media outlets, both print and broadcast, and gives guidelines for submitting material. For instance, most print and broadcast media have a "community calendar" where open houses and other public meetings can be publicized for free. Schools that are registered nonprofit organizations can submit public service announcements for free radio or television broadcast. For an event that meets the criteria of newsworthiness, a press release can generate free media coverage (see Close-Up at right).

Paid advertisements in local newspapers, radio, or television range from relatively inexpensive to quite costly, but they may be worthwhile for a major marketing event or enrollment campaign. Newspapers and magazines can provide circulation data to help advertisers judge cost-effectiveness. Some print media run a special section on education at crucial times of year.

Low-cost publicity for public meetings and for the school in general can include notices posted in libraries, churches, and stores. Sending out a mailer is another option. Although printing and postage can be costly, one way to minimize the cost is through group marketing with other schools in a common mailer.

A telephone listing in both white and yellow pages is a must. Larger Montessori communities have a tacit agreement not to place display ads to avoid needless competition between Montessori schools, which would only add to publicity costs.

Open Houses

Schedule several open house events during the year for families of prospective students and others in the community. Open houses can be scheduled on weekends or evenings, or combined with observations during school hours.

Invitations should be sent to all who have made inquiry calls. Advertise through local papers, circulars, and public service announcements on radio and television. Encourage parents of current students to invite friends who have young children. When advertising an open house, it is a good idea to request an RSVP so that nametags and folders can be prepared for each visiting

HOW TO WRITE A PRESS RELEASE

A press release can generate media coverage of any event considered "newsworthy," that is, timely, noteworthy, and of general community interest. Examples of newsworthy events include the following:

- The founding of a new school.
- A public meeting or open house, especially a meeting featuring a locally or nationally well-known speaker.
- An unusual joint venture between schools or between a school and another community agency.
- A fundraising event that is open to the public, such as an auction or carnival.
- The retirement of a longstanding faculty member.
- An award or honor earned by the school, a faculty member, or a student.
- The appointment of a prominent community member to a school's board of trustees.
- Groundbreaking for a new building or major expansion.
- A major gift or endowment to the school, or a particularly successful fundraising campaign.

Limit the use of press releases to events that truly are newsworthy. Some editors will ignore any release, no matter how interesting, sent by an organization that has made a habit of releasing unusable information.

A press release normally should not exceed two or three double-spaced pages and usually carries the words "press release" or "news release" prominently on the first page. At the top of the first page, give identifying information on the school as well as a contact person and phone numbers, both day and evening. Also give the date that the release is being sent and, if applicable, the date when the information can be made public (if there is no reason to delay publication, specify "for immediate release").

There is no need to supply a headline; editors write headlines as part of the layout process in order to fit the particular space available. The first paragraph of the release should contain the tried-and-true journalistic formula of the "five *W*s": *who, what, when, where,* and *why,* indicating as clearly as possible what is unusual or noteworthy about the event and why it is important *now.* Write the release in "inverted pyramid" format, with the most important information at the beginning, followed by less and less important details. When editors must cut a piece to fit a space, they cut from the bottom up.

Each page should be numbered, and the word "more" should appear centered at the bottom of each page except the last. Indicate the end of the release with three spaced pound signs centered below the copy; this is journalistic shorthand for "the end" (see Old Brooklyn Montessori School news release in Sample Documents). Although these markings may seem cryptic, they ensure that pages are not lost or placed in the wrong order; they also give the release a professional appearance. As a courtesy to the recipient, who may need to make notes or edits, double-space the entire body of the press release.

Consult the community media guide for the name of the person at each newspaper or broadcast station to whom the release should be directed, usually the city editor or education editor. If no media guide is available, use the yellow pages to compile a list of media to which the release will be sent, and call ahead to ask for the name of the appropriate recipient. It is a good idea to keep a computer file of these names and addresses so that press releases can be easily sent to the entire list. Periodically, however, check the individuals' names against the new media guide to keep them up to date. Finally, follow up the press release with a phone call, offering to answer any questions the editor or reporter may have.

family. An RSVP can also allow school staff to plan ahead to group visitors for tours according to the ages of their children.

Open houses are conducted by faculty, who are present in their classrooms, and usually by docents–administrators, school parents, or adolescent students–who bring the visitors to their

NAMTA provides introductory booklets suitable for sale or distribution at open houses, as well as short videos that can serve as an open house introductory presentation. See the current NAMTA catalog.

respective classrooms of interest after an overview tour of the building and grounds. Provide ample opportunity for conversation with faculty, staff, and parent representatives. Have promotional materials and application packages available and station a host to welcome, provide information, and schedule classroom observations.

Open houses can include a short introduction about the levels of education at the school, the philosophy of multi-age groups, and their respective prepared environments. These presentations should be very brief, providing just a few keys by which to help visitors see the principles behind what they observe.

An Internet Presence

It is becoming increasingly important for schools to have access to e-mail, as parents and others are coming to rely on electronic communication almost as much as the telephone. In addition, a presence on the World Wide Web can help a school get its message out to a local audience as well as to faraway parents planning to move to the community. In the 1999 NAMTA school directory, fully one-third of the schools listed provided an e-mail address, and 15% listed a Web site.

Some Internet service providers (America Online, for example) offer a free software "wizard" to produce a simple but functional Web site in a few easy steps. For a more elaborate or customized site, it is worth investing in Web authoring software such as Microsoft FrontPage or Adobe PageMill. These programs require a bit more expertise, but virtually any computer-literate person with some design talent can use them successfully. However, it is necessary to make sure the chosen program is supported by the chosen Internet hosting service.

It is important to submit the school's Web site to as many Internet search engines as possible. The following site has links to the submission pages of numerous search engines: www.tiac.net/users/seeker/searchenginesub.html.

If no one on staff is up for the challenge, a parent, graduate, or other friend of the school can usually design a Web site at minimal cost or as a volunteer project. If it becomes necessary to hire a consultant, the service can quickly become very expensive, running into the thousands.

A basic school Web site should give the same kinds of information as a school brochure: location, programs offered, philosophy, admissions procedures, etc. Including a calendar with frequent updates can make the site a valuable communication tool for the whole school community. Upper elementary and adolescent students may enjoy participating in creation and maintenance of the site. Links to national and international Montessori associations can help visitors see the school's connection with the world Montessori community.

The following Montessori schools have well-organized, attractive, and informative Web sites:

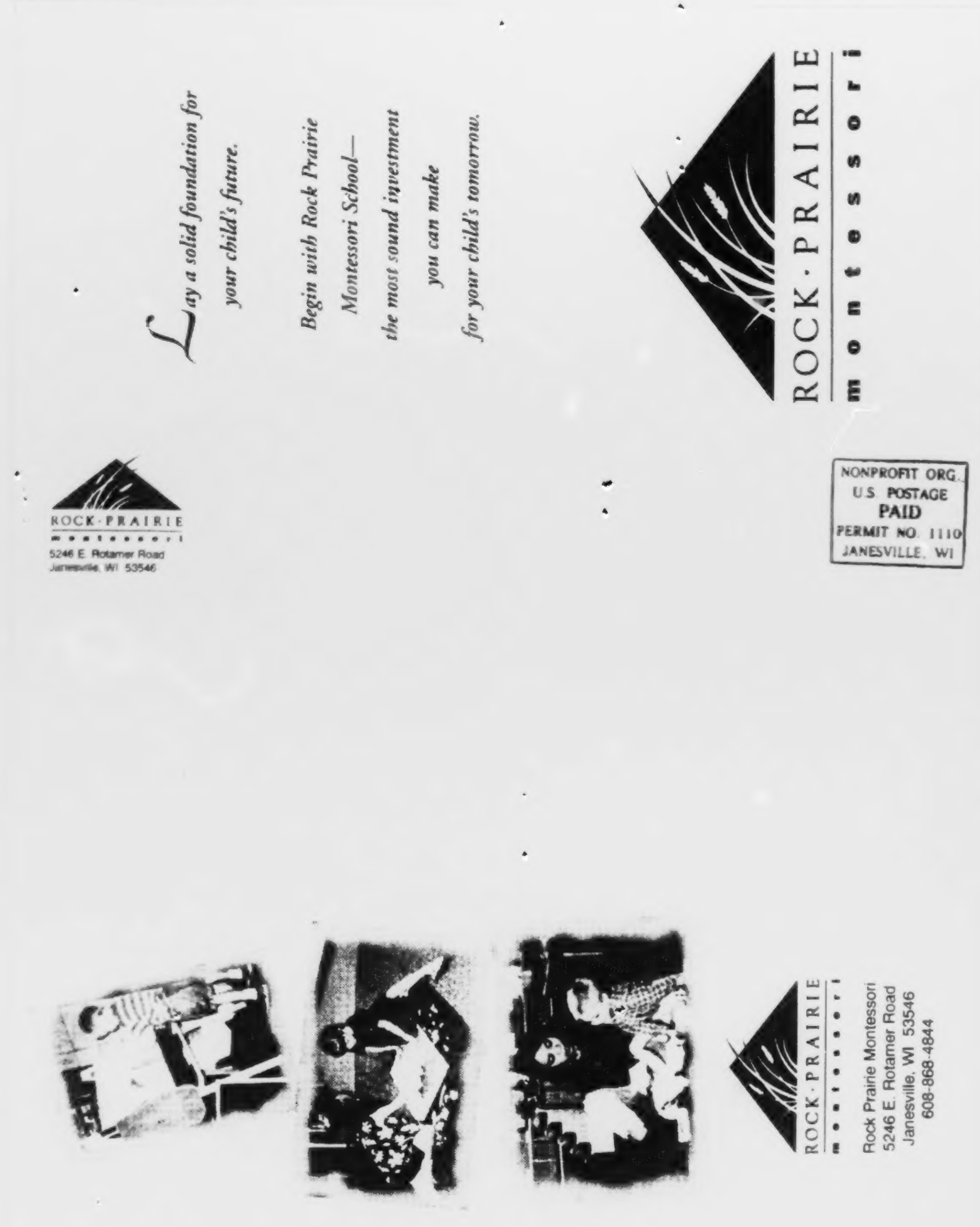
- The Butler School (Darnestown, MD): www.butlerschool.org

- Corvallis Montessori School (Corvallis, OR): www.proaxis.com/~cms
- Mercy Montessori Center (Cincinnati, OH): home.earthlink.net/~mercymont
- Near North Montessori School (Chicago, IL): www.nnms.org
- School of the Woods (Houston, TX): schoolofthewoods.org
- The Shelton School (Dallas, TX): www.shelton.org

Sample Documents

The following documents illustrate common practices in Montessori school operations. To view documents at full size, photocopy and enlarge.

Quick-Read Open House Flyer, Rock Prairie Montessori School (Janesville, WI)



Lay a solid foundation for your child's future.

Begin with Rock Prairie Montessori School—the most sound investment you can make for your child's tomorrow.

ROCK · PRAIRIE
montessori

NONPROFIT ORG.
U.S. POSTAGE
PAID
PERMIT NO. 1110
JANESVILLE, WI

ROCK · PRAIRIE
montessori
5246 E. Rotamer Road
Janesville, WI 53546

ROCK · PRAIRIE
montessori

Rock Prairie Montessori
5246 E. Rotamer Road
Janesville, WI 53546
608-868-4844

This inexpensive, 8½" x 11", tri-fold self-mailer using black ink on lightweight buff paper stock invites the public to a series of open houses and lectures combining parent education and publicity—a form of indirect advertising.
(outside of brochure)

Quick-Read Open House Flyer, Rock Prairie Montessori School (continued)

(inside of brochure)

Education
Nature

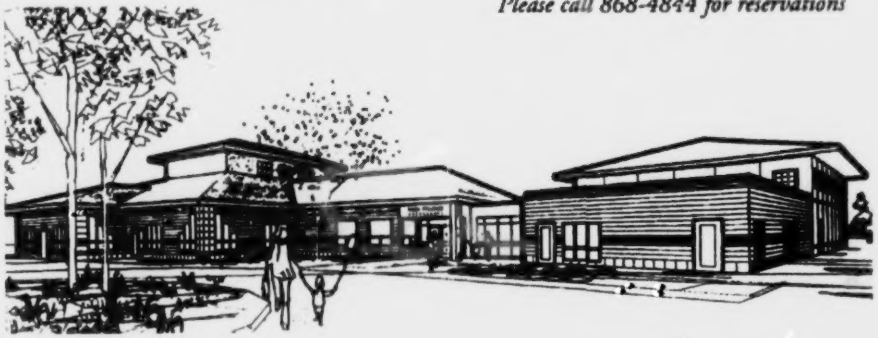
Nestled on a wooded lot on Rotamer Road is a new school demonstrating perfect harmony with education and nature. The Rock Prairie Montessori School combines form and function into the most wonderful, effective learning experience for your child.

Form
Function

Effective
Learning
Experiences

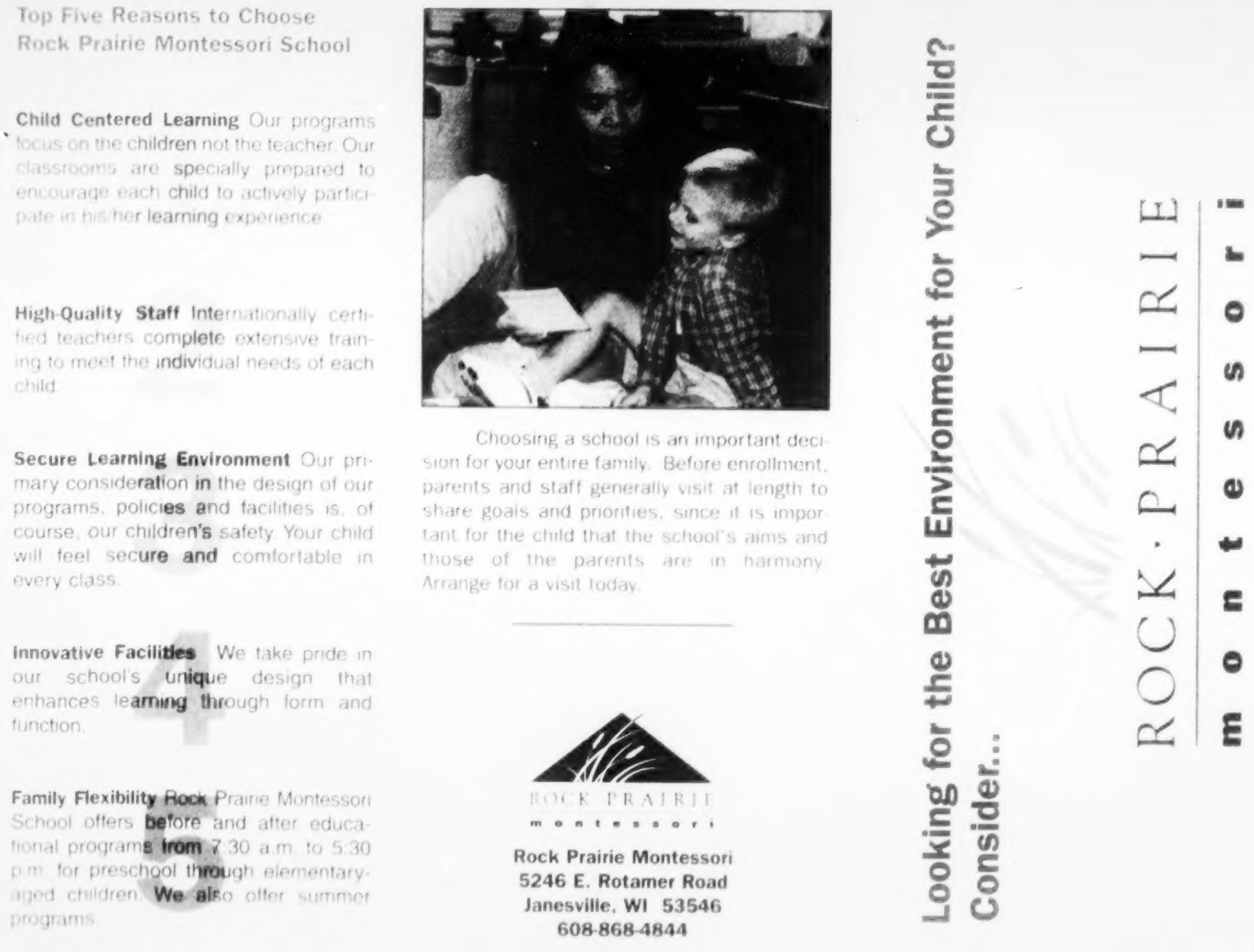
You are invited to attend...

February 5, 1998	*4:00-6:00pm*	*Open House* *The Child Centered Learning Series* *Part I* *Introduction to Montessori*
February 19, 1998	*7:00 pm*	*The Child Centered Learning Series* *Part II* *Introduction to Reading and Writing*
March 19, 1998	*12:00-1:30 pm*	*Learn and Observe Luncheon* *Please call 868-4844 for reservations*
March 24, 1998	*7:00 pm*	*The Child Centered Learning Series* *Part III* *Introduction to Mathematics*
April 22, 1998	*12:00-1:30 pm*	*Learn and Observe Luncheon* *Please call 868-4844 for reservations*



BEST COPY AVAILABLE

Quick-Read School Brochure, Rock Prairie Montessori School (Janesville, WI)



ROCK·PRAIRIE

montessori

Looking for the Best Environment for Your Child?

Consider...

Top Five Reasons to Choose
Rock Prairie Montessori School

Child Centered Learning Our programs focus on the children not the teacher. Our classrooms are specially prepared to encourage each child to actively participate in his/her learning experience.

High-Quality Staff Internationally certified teachers complete extensive training to meet the individual needs of each child.

Secure Learning Environment Our primary consideration in the design of our programs, policies and facilities is, of course, our children's safety. Your child will feel secure and comfortable in every class.

Innovative Facilities We take pride in our school's unique design that enhances learning through form and function.

Family Flexibility Rock Prairie Montessori School offers before and after educational programs from 7:30 a.m. to 5:30 p.m. for preschool through elementary-aged children. We also offer summer programs.

Choosing a school is an important decision for your entire family. Before enrollment, parents and staff generally visit at length to share goals and priorities, since it is important for the child that the school's aims and those of the parents are in harmony. Arrange for a visit today.

ROCK PRAIRIE
montessori

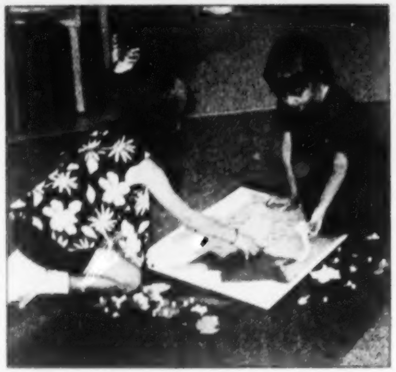
Rock Prairie Montessori
5246 E. Rotamer Road
Janesville, WI 53546
608-868-4844

This inexpensive but attractive 8½" x 11" tri-fold brochure, using primarily black ink plus forest green accents on medium-weight buff paper stock, introduces the school while assuming no prior knowledge of Montessori and avoiding Montessori buzzwords.
(outside of brochure)

Quick-Read School Brochure, Rock Prairie Montessori School (continued)

(inside of brochure)

Welcome to Rock Prairie Montessori School



In 1992, a group of parents began searching for an alternative educational program — one that would meet their goals of child-centered teaching and learning while maintaining high academic standards. The group chose the Montessori Method, and on September 6, 1994, 36 children attended their first day of school at Rock Prairie Montessori School.

Just 3 years later on September 6, 1997, our new, innovative school welcomes many children each day and can easily accommodate our consistently increasing enrollment. Arrange for a tour today!

Here's what you'll find in a Montessori School . . .

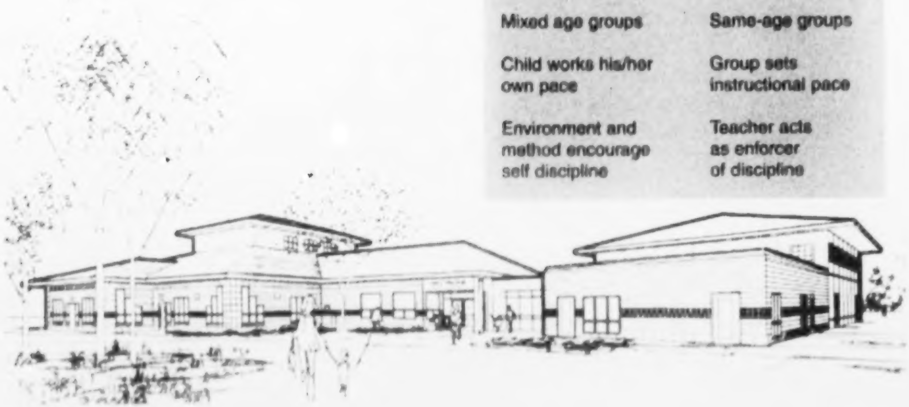
In a Montessori class, children engage in interactive learning in an environment carefully prepared by an educator trained to work with children of specific age groups.

In non-graded classes of mixed ages, children are given lessons with materials designed by Dr. Maria Montessori, choosing their activities and making discoveries about language, mathematics, geography, geometry, art and music.

The highly social atmosphere of this environment stems from a unique combination of freedom and structure founded on respect. A Montessori education fosters the fullest development of a child's potential and provides a foundation for a life of joyful and successful learning. Compare for yourself.

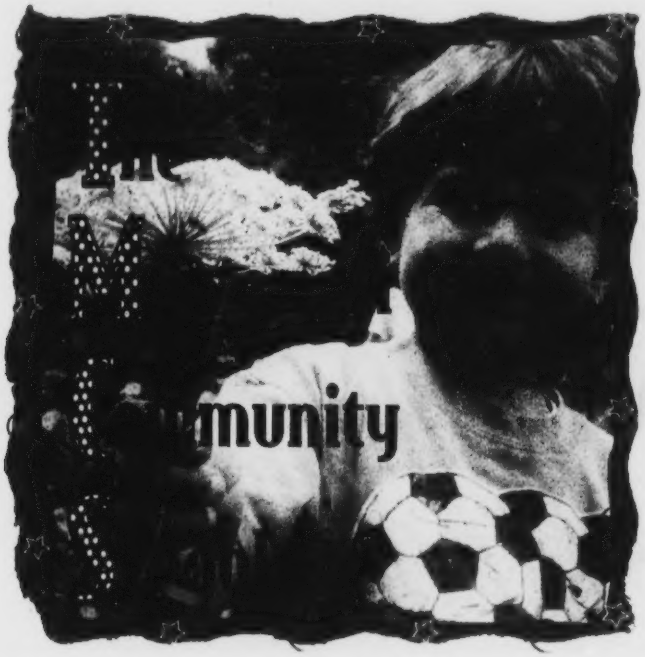
What Sets Montessori Apart?

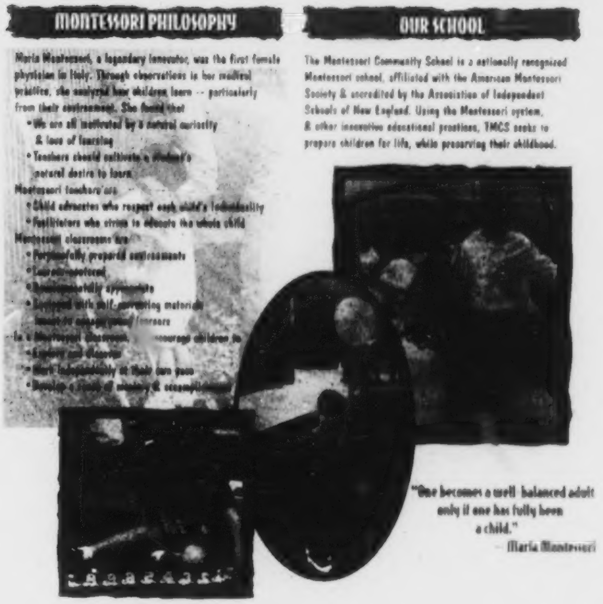
Montessori	Traditional
Emphasis on cognitive development	Emphasis on social development
Mainly individual instruction	Mainly group instruction
Mixed age groups	Same-age groups
Child works his/her own pace	Group sets instructional pace
Environment and method encourage self discipline	Teacher acts as enforcer of discipline



BEST COPY AVAILABLE

Quick-Read School Brochure, The Montessori Community School (Scituate, MA)





MONTESSORI PHILOSOPHY

Maria Montessori, a legendary innovator, was the first female physician in Italy. Through observations in her medical practice, she analyzed how children learn -- particularly from their environment. She found that
- We are all motivated by a natural curiosity & love of learning
- Teachers should cultivate a student's natural desire to learn

Montessori teachers are
- Child advocates who respect each child's individuality
- Facilitators who strive to educate the whole child

Montessori classrooms are
- Purposefully prepared environments
- Learner-centered
- Developmentally appropriate
- Equipped with self-correcting materials [illegible] learners

In a Montessori classroom, [illegible] encourage children to
- Explore and discover
- Work independently at their own pace
- Develop a sense of mastery & accomplishment

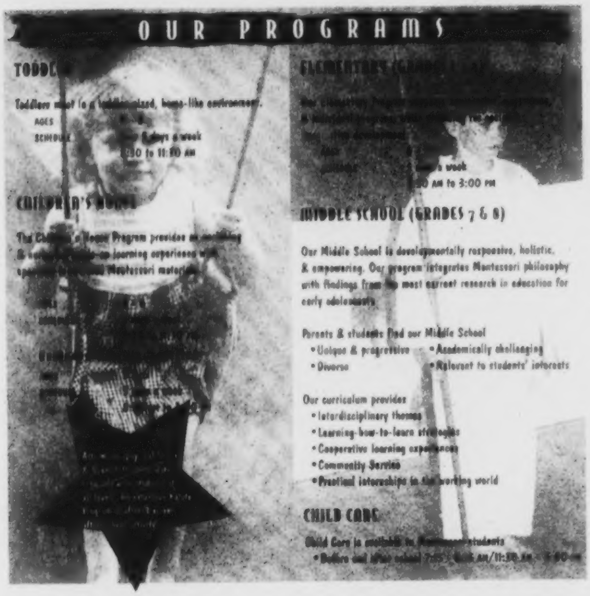
OUR SCHOOL

The Montessori Community School is a nationally recognized Montessori school, affiliated with the American Montessori Society & accredited by the Association of Independent Schools of New England. Using the Montessori system, & other innovative educational practices, TMCS seeks to prepare children for life, while preserving their childhood.

"One becomes a well balanced adult
only if one has fully been
a child."
– Maria Montessori

This four-page 8 x 8 brochure, using black-and-white photos plus magenta and teal text and graphics on heavy, gray, flecked paper stock, provides a basis for inquiry and avoids Montessori buzzwords. The lack of Montessori-specific photos might be a drawback.
(pages 1 and 2)

Quick-Read School Brochure, The Montessori Community School (continued)



OUR PROGRAMS

TODDLERS

Toddlers meet in a toddler-sized, home-like environment.

AGES [illegible]
SCHEDULE [illegible] days a week
[illegible]30 to 11:30 AM

CHILDREN'S HOUSE

The Children's House Program provides an enriching & [illegible] hands-on learning experience with [illegible] Montessori materials.

ELEMENTARY (GRADES [illegible])

[illegible]

AGES [illegible]
SCHEDULE [illegible] a week
[illegible]30 AM to 3:00 PM

MIDDLE SCHOOL (GRADES 7 & 8)

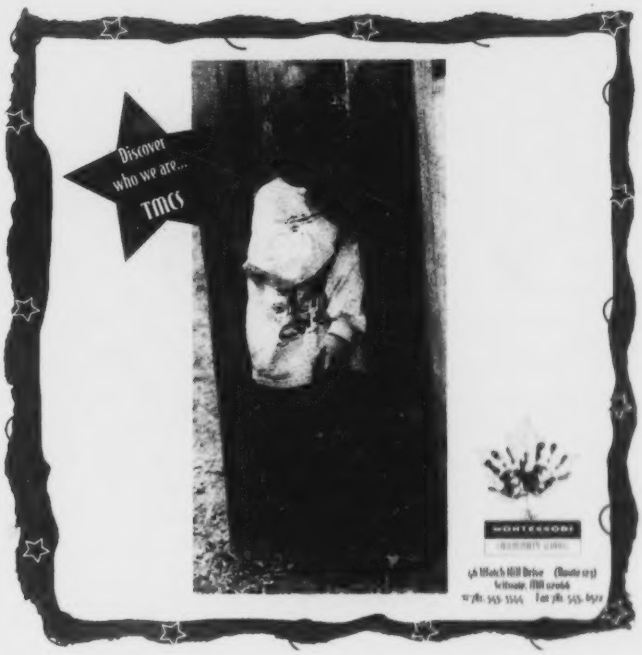
Our Middle School is developmentally responsive, holistic, & empowering. Our program integrates Montessori philosophy with findings from the most current research in education for early adolescents.

Parents & students find our Middle School
- Unique & progressive
- Academically challenging
- Diverse
- Relevant to students' interests

Our curriculum provides
- Interdisciplinary themes
- Learning-how-to-learn strategies
- Cooperative learning experiences
- Community Service
- Practical internships in the working world

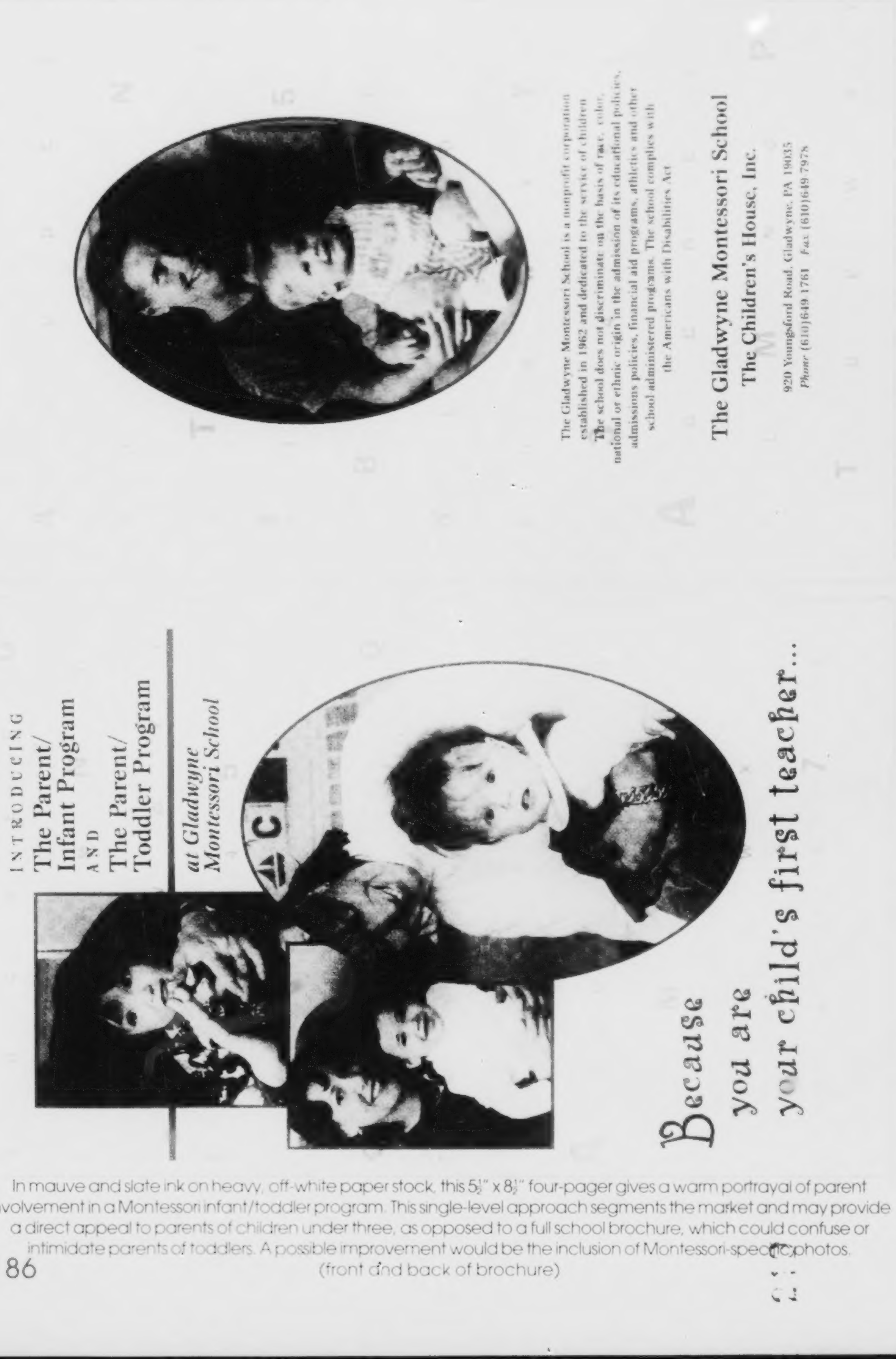
CHILD CARE

Child Care is available to Montessori students
- Before and after school 7:[illegible] AM/11:30 AM - [illegible] PM


Discover who we are...
TMCS
MONTESSORI

(pages 3 and 4)

Quick-Read on One Program Option, Gladwyne Montessori School (Gladwyne, PA)



INTRODUCING
The Parent/
Infant Program
AND
The Parent/
Toddler Program

*at Gladwyne
Montessori School*

Because
you are
your child's first teacher...

The Gladwyne Montessori School is a nonprofit corporation established in 1962 and dedicated to the service of children. The school does not discriminate on the basis of race, color, national or ethnic origin in the admission of its educational policies, admissions policies, financial aid programs, athletics and other school-administered programs. The school complies with the Americans with Disabilities Act.

The Gladwyne Montessori School
The Children's House, Inc.

920 Youngsford Road, Gladwyne, PA 19035
Phone (610)649-1761 *Fax* (610)649-7978

BEST COPY AVAILABLE

In mauve and slate ink on heavy, off-white paper stock, this 5½" x 8½" four-pager gives a warm portrayal of parent involvement in a Montessori infant/toddler program. This single-level approach segments the market and may provide a direct appeal to parents of children under three, as opposed to a full school brochure, which could confuse or intimidate parents of toddlers. A possible improvement would be the inclusion of Montessori-specific photos.
(front and back of brochure)

Quick-Read on One Program Option, Gladwyne Montessori School (continued)

(inside of brochure)

Plant the seeds of a Montessori education during your child's first two years of life.

The Parent/Infant Program

Up to 12 months

Picture a place where you and your infant are free to explore and enjoy a Montessori environment, learning from each other's movements and reactions. It's a place where you're not alone—where other parents join you to discuss issues associated with raising an infant, from developmental milestones to child care. What you are envisioning is Gladwyne Montessori's Parent/Infant Program.

The focus of this unique program is to aid parents as they experience the first year of their child's life, using Montessori methods and materials. One morning each week, parents and their infants come together with the program facilitator to grow, learn and bond.

Discussion topics are chosen by the parents, and activities employed help parents understand their role as their child's first teacher.

The addition of the Parent/Infant and Parent/Toddler programs at Gladwyne is the next step in achieving a Full Spectrum Montessori education at the school, which is instruction for children from birth through high school. For more information on the programs, call the Gladwyne Montessori School at (610) 649-1761.

The Parent/Toddler Program

12 to 24 months

Toddlers are curious. It's this probing nature that drives them to discover the world in which they live. Gladwyne Montessori's Parent/Toddler Program encourages parents to give their child independence to investigate on his or her own. This allows the young explorers to develop budding skills, such as fine and gross motor coordination and visual discrimination, through the senses and learning materials.

Although child-focused, the Parent/Toddler Program is also a forum for parents to talk about concerns they may have, from immunizations to sibling rivalry, with other parents and the group facilitator. The weekly meeting is a chance for parents to observe their child as he or she builds relationships with other toddlers, and to acquire insight into their child from a Montessori perspective.

Oh, how you both will grow...

187

Quick-Read on All Program Options, Montessori School of Lake Forest (Lake Forest, IL)

Mission Statement

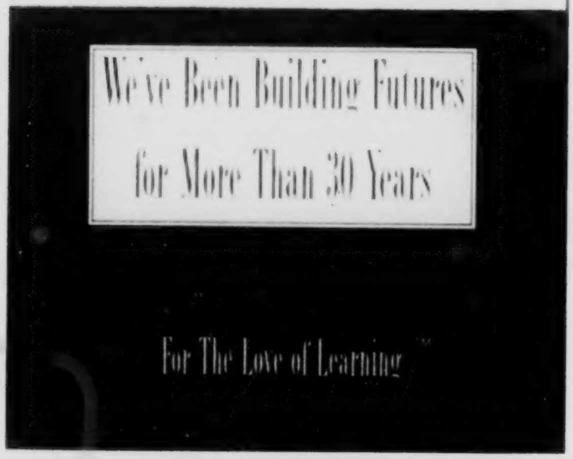
The Montessori School of Lake Forest (MSLF) serves children from birth through twelve years, using the philosophy and curriculum of Dr. Maria Montessori. The educational environment fosters respect, cooperation, order, choice within limits and provides children with the opportunity to build themselves to their fullest potential. The school's peaceful and non-competitive atmosphere promotes strong moral character and human values.

At each stage of development, the child acquires the tools necessary for critical thinking, decision making, and respect for all. Under the guidance of a Montessori trained educator, the child chooses what helps him/her to construct him/herself, which results in a love of life and learning, fostering independence, self-esteem and growth.

The Quality of a Montessori Education

Unlike the educational fads that come and go, the Montessori method has been used for almost a century. It is a curriculum that permits children to progress at their own pace. Children are not forced to adhere to artificial norms. It is a demanding program for our teachers, because teachers work with students as individuals, not as a class. Each child's progress is monitored individually and lessons are offered to children when they are developmentally ready, not on a fixed timetable.

Montessori School of Lake Forest

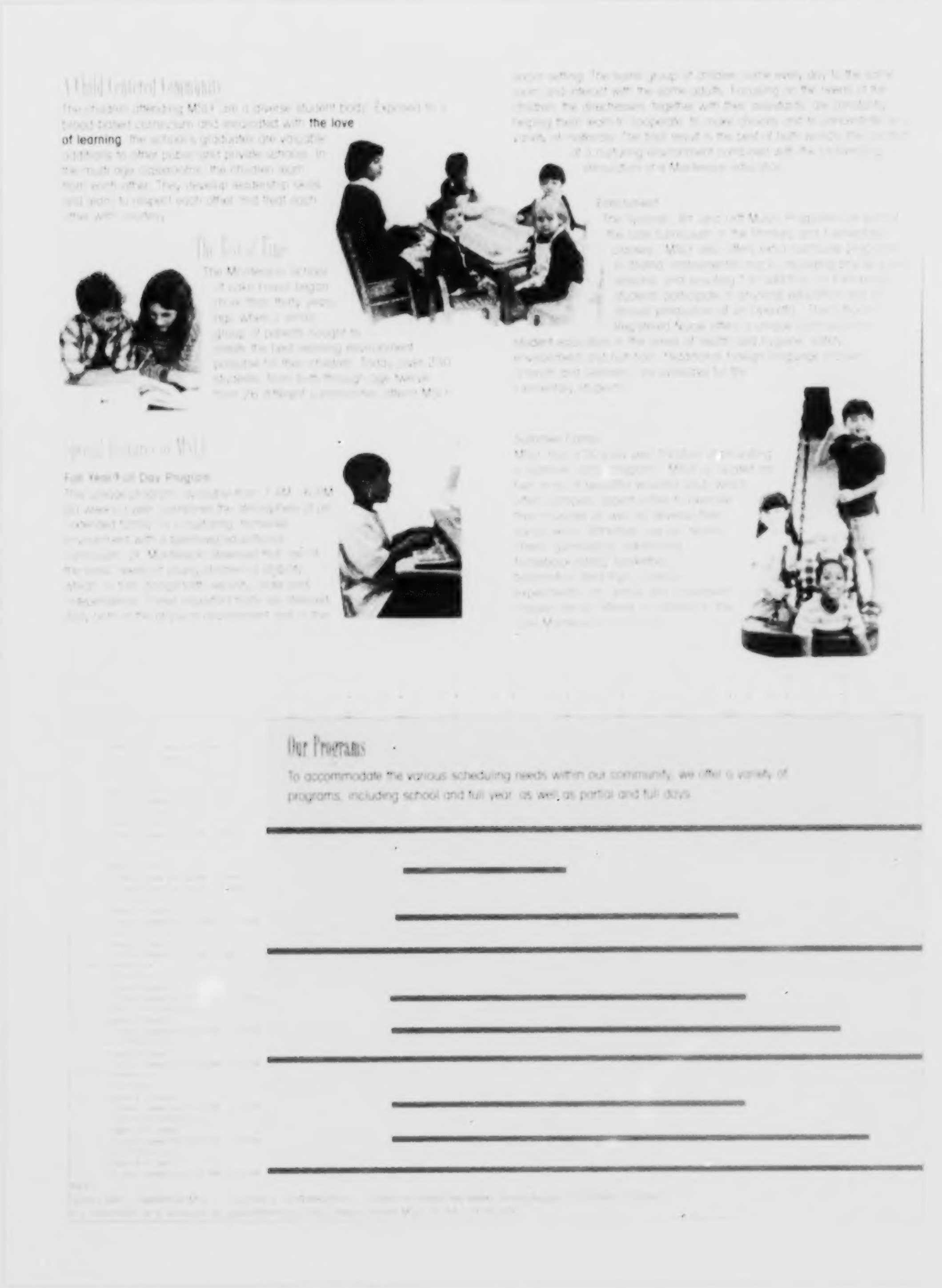


We've Been Building Futures for More Than 30 Years

For The Love of Learning™

This two-color, 8½" x 11", tri-fold self-mailer on heavy, coated ("slick") stock has a convenient time-based summary of program options. Again the descriptions are brief and avoid Montessori jargon. The Montessori-specific cover photo strengthens the Montessori appeal.
(outside of brochure)

Quick-Read on All Program Options, Montessori School of Lake Forest (continued)



A Child Centered Community

the love of learning

The Test of Time

Special Features of MSLF

Full Year/Full Day Program

Enrichment

Summer Camp

Our Programs

To accommodate the various scheduling needs within our community, we offer a variety of programs, including school and full year, as well as partial and full days.

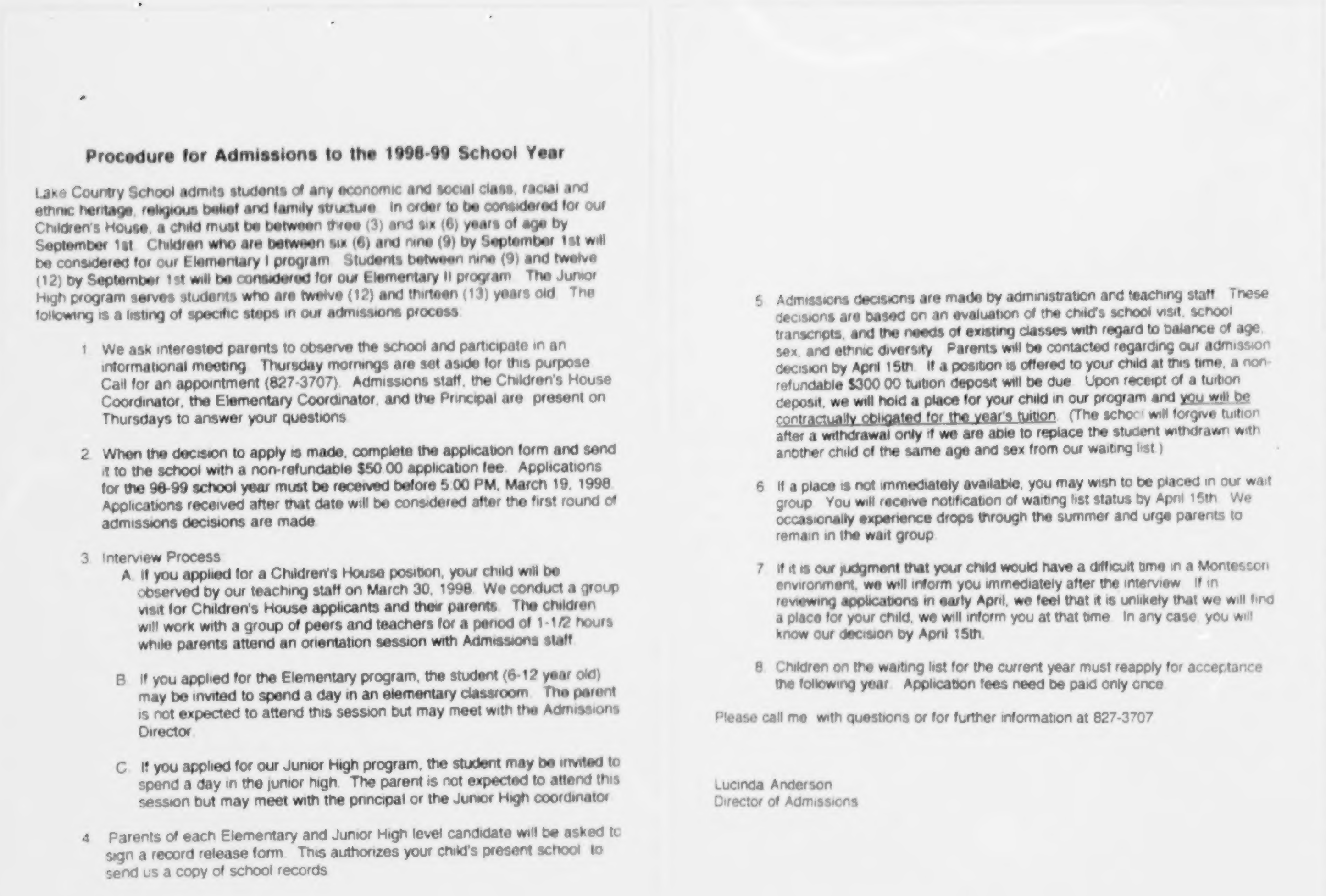
BEST COPY AVAILABLE (inside of brochure)

Full Admissions Packet, Lake Country School (Minneapolis, MN)

LAKE COUNTRY SCHOOL
LAKE COUNTRY SCHOOL
LAKE COUNTRY SCHOOL
Children's I
Application For Admission
Procedure for Admissions to
Schedule
of
Tuition and Fees
1998-1999

A two-pocket folder with the admissions director's card allows for maximum flexibility as to contents. The inserts, mostly 8½" x 11" sheets, can be easily updated from year to year. This packet clearly spells out admissions procedure, promulgates tuition and fees, and mentions annual giving from the outset to guide expectations. There is also a nice letter of introduction from the admissions director.

Full Admissions Packet, Lake Country School (continued)



Procedure for Admissions to the 1998-99 School Year

Lake Country School admits students of any economic and social class, racial and ethnic heritage, religious belief and family structure. In order to be considered for our Children's House, a child must be between three (3) and six (6) years of age by September 1st. Children who are between six (6) and nine (9) by September 1st will be considered for our Elementary I program. Students between nine (9) and twelve (12) by September 1st will be considered for our Elementary II program. The Junior High program serves students who are twelve (12) and thirteen (13) years old. The following is a listing of specific steps in our admissions process:

1. We ask interested parents to observe the school and participate in an informational meeting. Thursday mornings are set aside for this purpose. Call for an appointment (827-3707). Admissions staff, the Children's House Coordinator, the Elementary Coordinator, and the Principal are present on Thursdays to answer your questions.

2. When the decision to apply is made, complete the application form and send it to the school with a non-refundable $50.00 application fee. Applications for the 98-99 school year must be received before 5:00 PM, March 19, 1998. Applications received after that date will be considered after the first round of admissions decisions are made.

3. Interview Process
   - A. If you applied for a Children's House position, your child will be observed by our teaching staff on March 30, 1998. We conduct a group visit for Children's House applicants and their parents. The children will work with a group of peers and teachers for a period of 1-1/2 hours while parents attend an orientation session with Admissions staff.
   - B. If you applied for the Elementary program, the student (6-12 year old) may be invited to spend a day in an elementary classroom. The parent is not expected to attend this session but may meet with the Admissions Director.
   - C. If you applied for our Junior High program, the student may be invited to spend a day in the junior high. The parent is not expected to attend this session but may meet with the principal or the Junior High coordinator.

4. Parents of each Elementary and Junior High level candidate will be asked to sign a record release form. This authorizes your child's present school to send us a copy of school records.

5. Admissions decisions are made by administration and teaching staff. These decisions are based on an evaluation of the child's school visit, school transcripts, and the needs of existing classes with regard to balance of age, sex, and ethnic diversity. Parents will be contacted regarding our admission decision by April 15th. If a position is offered to your child at this time, a non-refundable $300.00 tuition deposit will be due. Upon receipt of a tuition deposit, we will hold a place for your child in our program and you will be contractually obligated for the year's tuition. (The school will forgive tuition after a withdrawal only if we are able to replace the student withdrawn with another child of the same age and sex from our waiting list.)

6. If a place is not immediately available, you may wish to be placed in our wait group. You will receive notification of waiting list status by April 15th. We occasionally experience drops through the summer and urge parents to remain in the wait group.

7. If it is our judgment that your child would have a difficult time in a Montessori environment, we will inform you immediately after the interview. If in reviewing applications in early April, we feel that it is unlikely that we will find a place for your child, we will inform you at that time. In any case, you will know our decision by April 15th.

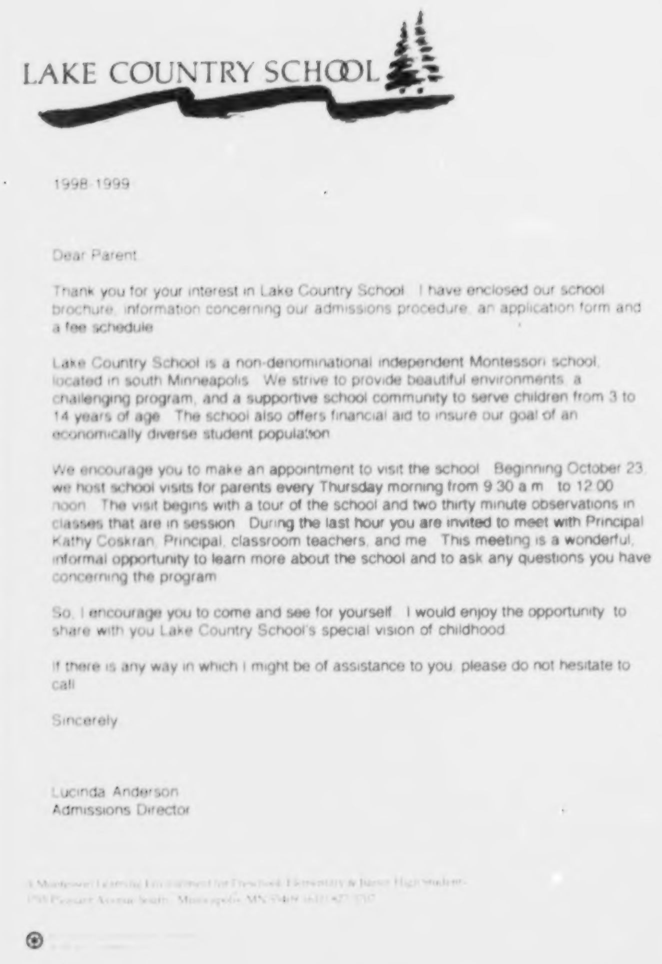
8. Children on the waiting list for the current year must reapply for acceptance the following year. Application fees need be paid only once.

Please call me with questions or for further information at 827-3707.

Lucinda Anderson
Director of Admissions

Admissions procedure, front and back.

Full Admissions Packet, Lake Country School (continued)



LAKE COUNTRY SCHOOL

1998-1999

Dear Parent,

Thank you for your interest in Lake Country School. I have enclosed our school brochure, information concerning our admissions procedure, an application form and a fee schedule.

Lake Country School is a non-denominational independent Montessori school, located in south Minneapolis. We strive to provide beautiful environments, a challenging program, and a supportive school community to serve children from 3 to 14 years of age. The school also offers financial aid to insure our goal of an economically diverse student population.

We encourage you to make an appointment to visit the school. Beginning October 23, we host school visits for parents every Thursday morning from 9:30 a.m. to 12:00 noon. The visit begins with a tour of the school and two thirty minute observations in classes that are in session. During the last hour you are invited to meet with Principal Kathy Coskran, Principal, classroom teachers, and me. This meeting is a wonderful, informal opportunity to learn more about the school and to ask any questions you have concerning the program.

So, I encourage you to come and see for yourself. I would enjoy the opportunity to share with you Lake Country School's special vision of childhood.

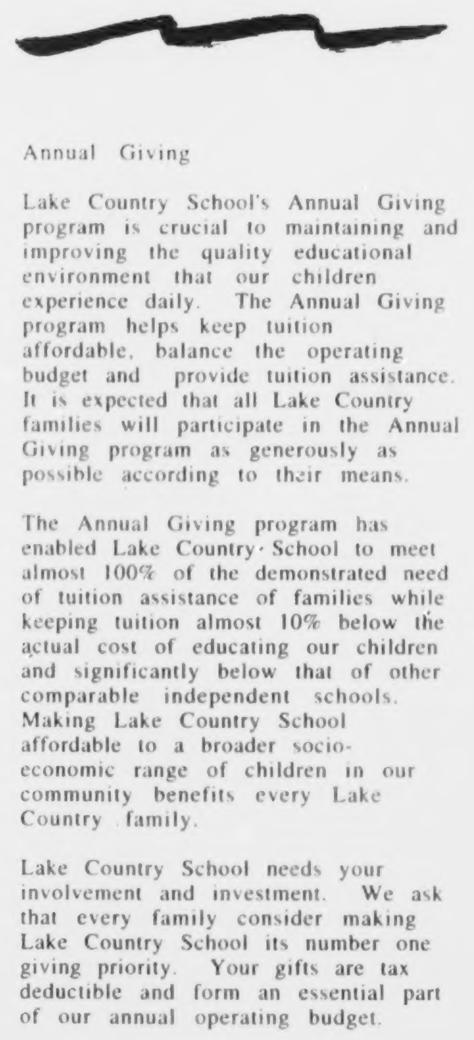
If there is any way in which I might be of assistance to you, please do not hesitate to call.

Sincerely,

Lucinda Anderson
Admissions Director

A Montessori Learning Environment for Preschool, Elementary & Junior High Students
[illegible] Pleasant Avenue South · Minneapolis, MN 55409 [illegible]

Letter of introduction and annual giving statement



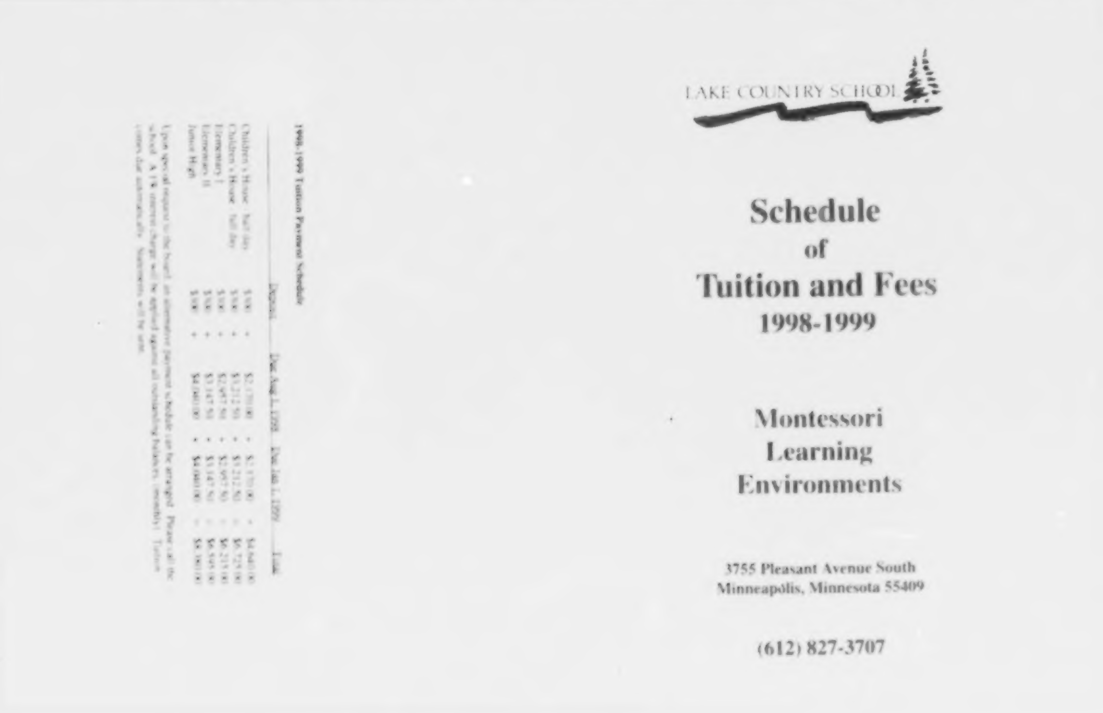
Annual Giving

Lake Country School's Annual Giving program is crucial to maintaining and improving the quality educational environment that our children experience daily. The Annual Giving program helps keep tuition affordable, balance the operating budget and provide tuition assistance. It is expected that all Lake Country families will participate in the Annual Giving program as generously as possible according to their means.

The Annual Giving program has enabled Lake Country School to meet almost 100% of the demonstrated need of tuition assistance of families while keeping tuition almost 10% below the actual cost of educating our children and significantly below that of other comparable independent schools. Making Lake Country School affordable to a broader socio-economic range of children in our community benefits every Lake Country family.

Lake Country School needs your involvement and investment. We ask that every family consider making Lake Country School its number one giving priority. Your gifts are tax deductible and form an essential part of our annual operating budget.

Full Admissions Packet, Lake Country School (continued)



1998-1999 Tuition Payment Schedule

	Deposit		Due Aug 1, 1998		Due Jan 1, 1999		Total
Children's House - half day	$300	+	$2,170.00	+	$2,170.00	=	$4,640.00
Children's House - full day	$300	+	$3,212.50	+	$3,212.50	=	$6,725.00
Elementary I	$300	+	$2,957.50	+	$2,957.50	=	$6,215.00
Elementary II	$300	+	$3,147.50	+	$3,147.50	=	$6,595.00
Junior High	$300	+	$4,040.00	+	$4,040.00	=	$8,380.00

Upon special request to the board, an alternative payment schedule can be arranged. Please call the school. A 1% interest charge will be applied against all outstanding balances (monthly). Tuition comes due automatically. Statements will be sent.

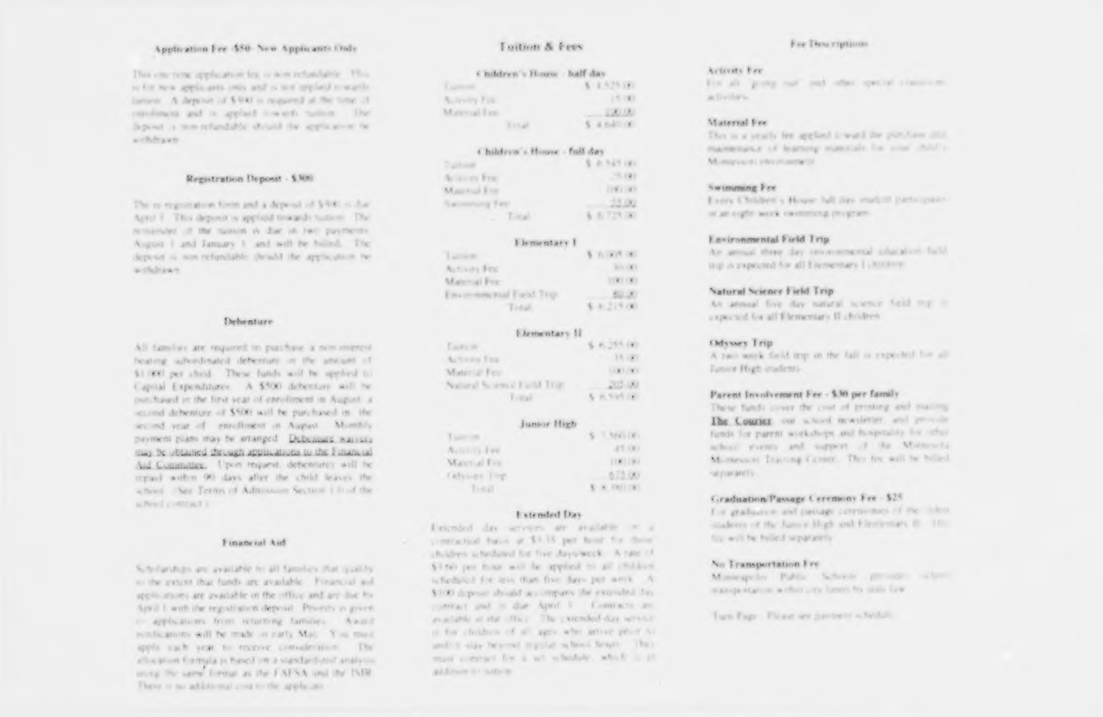
LAKE COUNTRY SCHOOL

Schedule
of
Tuition and Fees
1998-1999

Montessori
Learning
Environments

3755 Pleasant Avenue South
Minneapolis, Minnesota 55409

(612) 827-3707



Application Fee -$50- New Applicants Only

This one time application fee is non-refundable. This is for new applicants only and is not applied towards tuition. A deposit of $300 is required at the time of enrollment and is applied towards tuition. The deposit is non-refundable should the application be withdrawn.

Registration Deposit - $300

The re-registration form and a deposit of $300 is due April 1. This deposit is applied towards tuition. The remainder of the tuition is due in two payments: August 1 and January 1, and will be billed. The deposit is non-refundable should the application be withdrawn.

Debenture

All families are required to purchase a non-interest bearing subordinated debenture in the amount of $1,000 per child. These funds will be applied to Capital Expenditures. A $500 debenture will be purchased in the first year of enrollment in August; a second debenture of $500 will be purchased in the second year of enrollment in August. Monthly payment plans may be arranged. Debenture waivers may be obtained through applications to the Financial Aid Committee. Upon request, debentures will be repaid within 90 days after the child leaves the school. (See Terms of Admission Section 1.3 of the school contract.)

Financial Aid

Scholarships are available to all families that qualify to the extent that funds are available. Financial aid applications are available in the office and are due by April 1 with the registration deposit. Priority is given to applications from returning families. Award notifications will be made in early May. You must apply each year to receive consideration. The allocation formula is based on a standardized analysis using the same format as the FAFSA and the ISIR. There is no additional cost to the applicant.

Tuition & Fees

Children's House - half day

Tuition	$ 4,525.00
Activity Fee	15.00
Material Fee	100.00
Total	$ 4,640.00

Children's House - full day

Tuition	$ 6,545.00
Activity Fee	25.00
Material Fee	100.00
Swimming Fee	55.00
Total	$ 6,725.00

Elementary I

Tuition	$ 6,005.00
Activity Fee	30.00
Material Fee	100.00
Environmental Field Trip	80.00
Total	$ 6,215.00

Elementary II

Tuition	$ 6,255.00
Activity Fee	35.00
Material Fee	100.00
Natural Science Field Trip	205.00
Total	$ 6,595.00

Junior High

Tuition	$ 7,560.00
Activity Fee	45.00
Material Fee	100.00
Odyssey Trip	672.00
Total	$ 8,380.00

Extended Day

Extended day services are available on a contractual basis at $3.35 per hour for those children scheduled for five days/week. A rate of $3.60 per hour will be applied to all children scheduled for less than five days per week. A $100 deposit should accompany the extended day contract and is due April 1. Contracts are available at the office. The extended day service is for children of all ages who arrive prior to and/or stay beyond regular school hours. They must contract for a set schedule, which is in addition to tuition.

Fee Descriptions

Activity Fee
For all "going out" and other special classroom activities.

Material Fee
This is a yearly fee applied toward the purchase and maintenance of learning materials for your child's Montessori environment.

Swimming Fee
Every Children's House full day student participates in an eight week swimming program.

Environmental Field Trip
An annual three day environmental education field trip is expected for all Elementary I children.

Natural Science Field Trip
An annual five day natural science field trip is expected for all Elementary II children.

Odyssey Trip
A two week field trip in the fall is expected for all Junior High students.

Parent Involvement Fee - $30 per family
These funds cover the cost of printing and mailing **The Courier**, our school newsletter, and provide funds for parent workshops and hospitality for other school events and support of the Minnesota Montessori Training Center. This fee will be billed separately.

Graduation/Passage Ceremony Fee - $25
For graduation and passage ceremonies of the oldest students of the Junior High and Elementary II. This fee will be billed separately.

No Transportation Fee
Minneapolis Public Schools provides school transportation within city limits by state law.

Turn Page - Please see payment schedule.

Tuition and fees schedule—tri-fold 8½" x 11" brochure, inside and outside

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Full Admissions Packet, Lake Country School (continued)

Children's House program description, front and back

LAKE COUNTRY SCHOOL

Children's House for Ages 3 to 6

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

Director of Admissions
Lake Country School
[illegible] Pleasant Avenue S
Minneapolis, MN [illegible]
[illegible]

Practical Life: Through practical life activities children acquire many daily living skills: preparing food, fastening clothes and caring for their environment. These activities also help children extend their powers of concentration and develop coordinated movement.

Sensorial Activities: Through interaction with sensorial materials which isolate one quality — such as color or shape — children experience the world through their senses, in a way that establishes the physical and mental foundation for further learning.

Language Activities: The Children's House is a language rich environment. Through a variety of language activities and materials, children become familiar with sounds and symbols and begin the process of writing which naturally leads to reading. A French specialist introduces a second language to children at the time when they are physically, emotionally and cognitively most receptive to learn it.

Mathematics: In the Children's House program children begin to explore mathematical relationships by manipulating concrete materials — such as number rods — that are designed to isolate a concept and prepare them for abstract reasoning. The goals of the program are for each child to develop a love of numbers, problem-solving strategies, computational skills and confidence in using numbers in everyday life.

Cultural Activities: Art, music, science and geography are integrated into the whole language experience. A music specialist works weekly with each child. An art specialist meets with the afternooners for one art class per week. Living plants, animals and hands-on materials are part of the classroom, allowing children to develop skills in scientific observation and comparison.

Social Activities
In a Montessori classroom, children experience the balance between the freedom of the individual and the concerns of the group. Other social behaviors that flourish in Children's House are responsibility for one's own behavior, respect for others, and care of the environment.

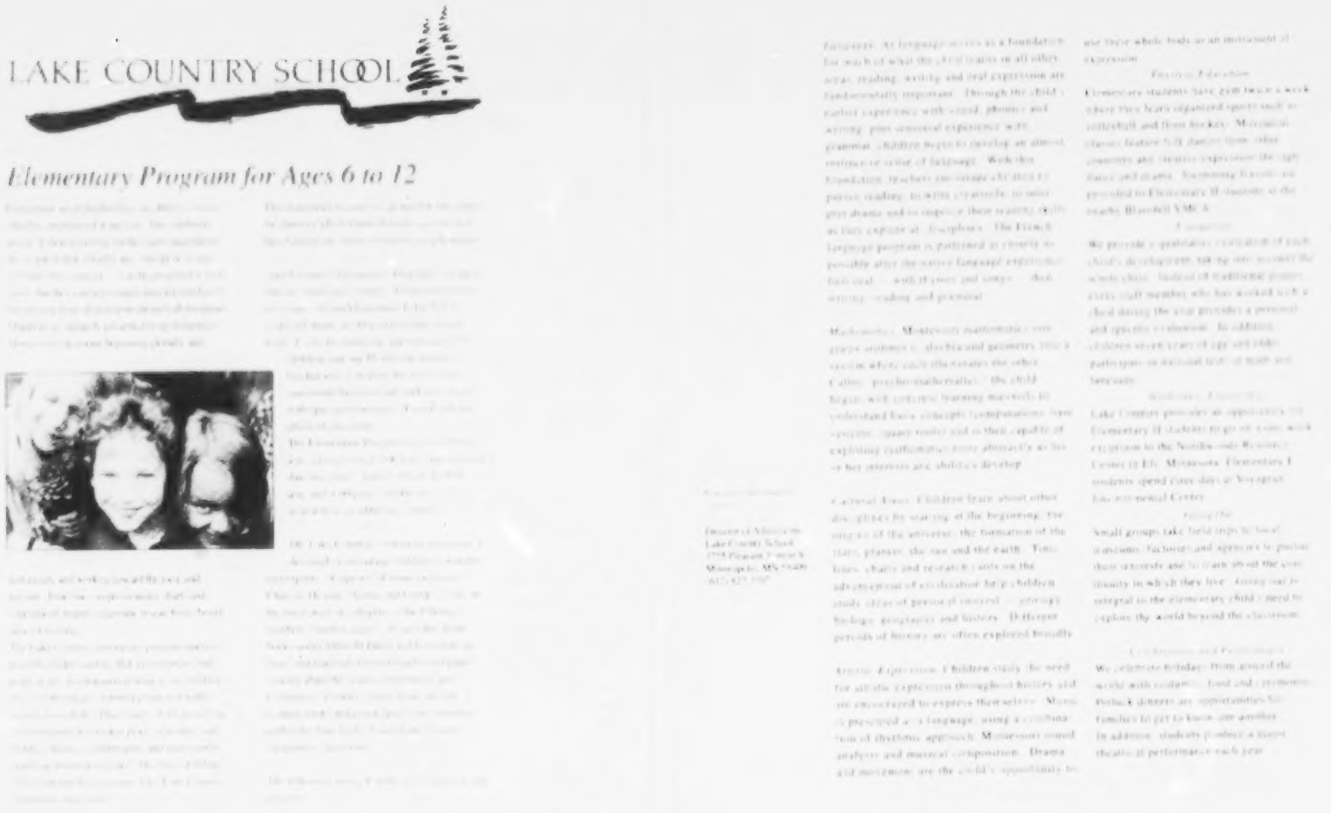
Physical Education
Children's House is different from a traditional group-oriented preschool in that children are free to choose activities and move about the room. Through natural physical activity, children expend energy and develop large and small muscle coordination. After lunch, Afternooners have a play period outside or in the gymnasium. In addition, they meet with a movement instructor once a week.

Celebrations and Traditions
Children's House celebrations develop a sense of community. At Thanksgiving, children share a potluck feast in the classroom. The mid-winter holiday explores the traditions of the winter season throughout the world. Annual events usually include a hayride and fall picnic and a Children's House play.

Food
Carrying their own lunch is an opportunity for children to bring part of home to school each day. Healthy snacks and juices are also provided in the morning.

Conferences
Conferences to discuss each child's development are held twice a year. Teachers communicate frequently with parents through notes, phone calls and the regular Lake Country communication channels.

Full Admissions Packet, Lake Country School (continued)



LAKE COUNTRY SCHOOL

Elementary Program for Ages 6 to 12

Elementary program description, front and back

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Full Admissions Packet, Lake Country School (continued)

LAKE COUNTRY SCHOOL

Junior High Program for 7th and 8th Grades

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

4. To provide the kind of education that prepares children to think, to be both intellectually independent and interdependent, and to be conscious of and share ideas and ways of thinking that are our common heritage.

The Program

The following areas of study comprise the core of the junior high curriculum:

Language: The major emphasis of the language program is writing — journal writing, creative writing, editing, research/composition skills and rhetoric. We also emphasize critical reading skills. Titles and topics vary widely — classical and modern, Asian, American and European, and we use an interdisciplinary humanities approach. Students also study Latin and French.

Mathematics: Students study advanced arithmetic and algebra. The approach is individualized and is both practical and theoretical. We use a developmental mathematics program developed by the University of Chicago that takes student through the first year of algebra.

Science: Lake Country's junior high science program is based on experiential learning. Students study energy and recycling, the geology of Minnesota, archaeology, weather and phenology, astronomy and night ecology, chemistry, physics, evolution, the human body, ecology and environmental ethics.

Government, Economics, Geography: Students study local and state government as well as national and world governments. The fundamental principles of economics, natural resources, economic leadership, the stock market, poverty and labor/management issues are also covered in the curriculum.

Humanities: Students explore the great ideas that form the fabric of Western heritage through the study of ethics, literature, history, art and music.

Philosophy Courses: For a trimester, junior high students are engaged in studying and practicing logic, ethics, reasoning, argumentation and clear thinking in an introduction to the discipline of philosophy.

Artistic Expression: Students are encouraged to explore their personal history and their place in the world through artistic expression at Lake Country. Our art program balances expression with the development of two- and three-dimensional artistic skills. Museum exhibit tours and projects with pottery, printing and papermaking round out the junior high student's art experience.

Evaluation

We provide a qualitative evaluation of each student's performance taking into account the whole person, including strengths and limitations as well as social, physical and creative achievements. Evaluation takes two forms: written evaluations and a personal discussion between parents, the student and all faculty members who have worked with each student. To prepare for a graded high school situation, most students choose to receive grades at the end of each trimester.

Physical Education

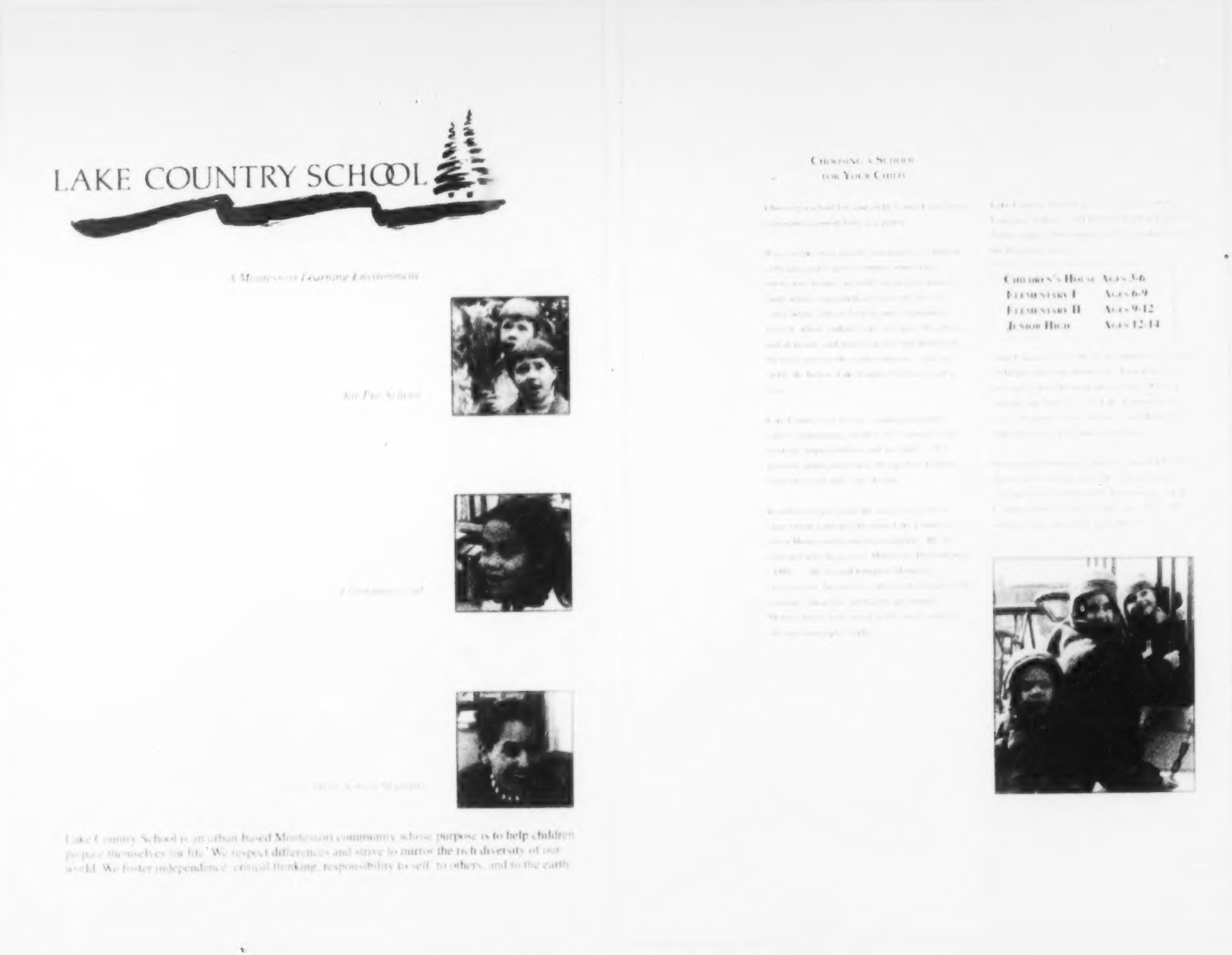
Gym classes include basic exercises and a variety of life and team sports. Lake Country athletes participate in the Co-ed Division of the Twin Cities Lutheran Conference with teams in basketball, cross country, floor hockey, soccer, softball and volleyball.

For more information contact:

Director of Admissions
Lake Country School
3755 Pleasant Avenue S.
Minneapolis, MN 55409
(612) 827-3307

Junior High program description, front and back.

Full Admissions Packet, Lake Country School (continued)



LAKE COUNTRY SCHOOL

A Montessori Learning Environment

Lake Country School is an urban based Montessori community whose purpose is to help children prepare themselves for life.' We respect differences and strive to mirror the rich diversity of our world. We foster independence, critical thinking, responsibility to self, to others, and to the earth.

CHOOSING A SCHOOL FOR YOUR CHILD

CHILDREN'S HOUSE	AGES 3-6
ELEMENTARY I	AGES 6-9
ELEMENTARY II	AGES 9-12
JUNIOR HIGH	AGES 12-14

Eight-page, 8½" x 11" brochure, black-and-white photos, black text, two accent colors on light green textured paper

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Brochure, continued

A LAKE COUNTRY EDUCATION

[illegible]

Lake Country [illegible] a Montessori [illegible] [illegible]

Montessori is both an educational philosophy and a [illegible] of childhood. Montessorians recognize the [illegible] of each child and respect individual patterns of growth. At Lake Country, the physical surroundings, the learning materials and the ways in which students interact with one another are choreographed to create an environment in which children can discover their unique relationship to the world.

At Lake Country, we believe independence [illegible] are key elements in learning. With each learning activity based on the needs and interests of the student, they develop independence and the ability to make good choices early on. It is through their own work in our specially prepared environments that children develop self-discipline and self-[illegible] that will last a lifetime.

[illegible]

Montessori hands-on materials incorporate many of the more current learning theories. The materials begin at a very sensorial level and become increasingly abstract as the student's understanding grows. Montessori materials are sequential: for example, the [illegible] beads in the Children's House form the foundation of the junior high student's abstract understanding of cube root and algebraic formulas.

Lake Country School's *Intensive Specialist Scheduling (ISS)* in music, French, and art distinguishes us from

other Montessori schools in the Twin Cities. Rather than short weekly sessions, specialists establish intensive three month residencies in each classroom, immersing students in the subject. After the residency has ended, regular classroom teachers provide additional guidance in these areas. A physical education specialist works with elementary and junior high students weekly.

LAKE COUNTRY LOCATION AND FACILITIES

[illegible]

A Lake Country classroom feels very different from a traditional classroom. Rather than placing a teacher at the center, here you'll find students directing their own activities and learning from one another. While one student reads about Renaissance painters, another works at a computer and another dissects a flower with a friend. The teacher or classroom specialist circulates throughout the room, observing and coaching individuals or groups. Children are clustered in groups representing a three year age span. Multi-age classrooms promote collaborative learning, a cornerstone of the Montessori philosophy, and encourage the development of a strong community, one in which only one-third of the students change each year. Over three years, a student and teacher create a rich relationship based upon trust and an understanding of learning styles.

Class size is an important component of a Montessori education. Maria Montessori prescribed a class of about 30 students to promote both *independence and interdependence*. Lake Country's classrooms average 28 at the Children's House and elementary level. Each Children's House classroom has two fully trained Montessori teachers plus specialists; each elementary teacher teams with a specialist. The junior high level averages 45 students, with three full-time teachers and four specialists. Teachers are always accessible as students are free to move about the classroom. Montessori classrooms buzz with a variety of activities and conversation. Guidelines for speaking, interrupting, handling the materials and interacting with classmates are established in collaboration between students and the teacher.

Celebrations and rituals are important components of life at Lake Country. They are a key to building community, to understanding other cultures and to preserving memories for children. Birthdays, holidays of many religions and cultures and global events are marked by celebrations at Lake Country. Celebrations that have been held in recent years include Wisdom Day (Russian) which inaugurates the school year, Santa Lucia (Sweden), Kwanzaa (Africa) and Earth Day.

[illegible]

Located in south Minneapolis, just east of Lake Calhoun, Lake Country School is about 10 minutes from downtown Minneapolis. In selecting this urban location, Lake Country sought a neighborhood which was accessible for students from throughout the Twin Cities and reflected a commitment to cultural diversity. The Twin Cities are part of our classroom; students regularly journey forth for educational, cultural and recreational experiences.

In 1989, Lake Country completed a $2.5 million project to purchase and renovate the existing school building. An auditorium and gymnasium, as well as the junior high space, were added. The building reflects our teaching philosophy — it is open, well lit and provides spaces for individual work (window seats and lofts) and for community gatherings (the gym and junior high commons area). A Research Center with 6,000 titles is centrally located for students of all ages. The grounds feature a playing field, playground structures and gardens.

Full Admissions Packet, Lake Country School (continued)

Brochure, continued

[illegible]

[illegible]

[illegible]

LAKE COUNTRY FACULTY

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

LAKE COUNTRY STUDENTS

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

[illegible]

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Full Admissions Packet, Lake Country School (continued)

Brochure, continued

LAKE COUNTRY PARENTS

[illegible]

ATTENDING LAKE COUNTRY

[illegible]

Children's House [illegible]

Elementary Program [illegible]

[illegible]

Junior High [illegible]

[illegible]

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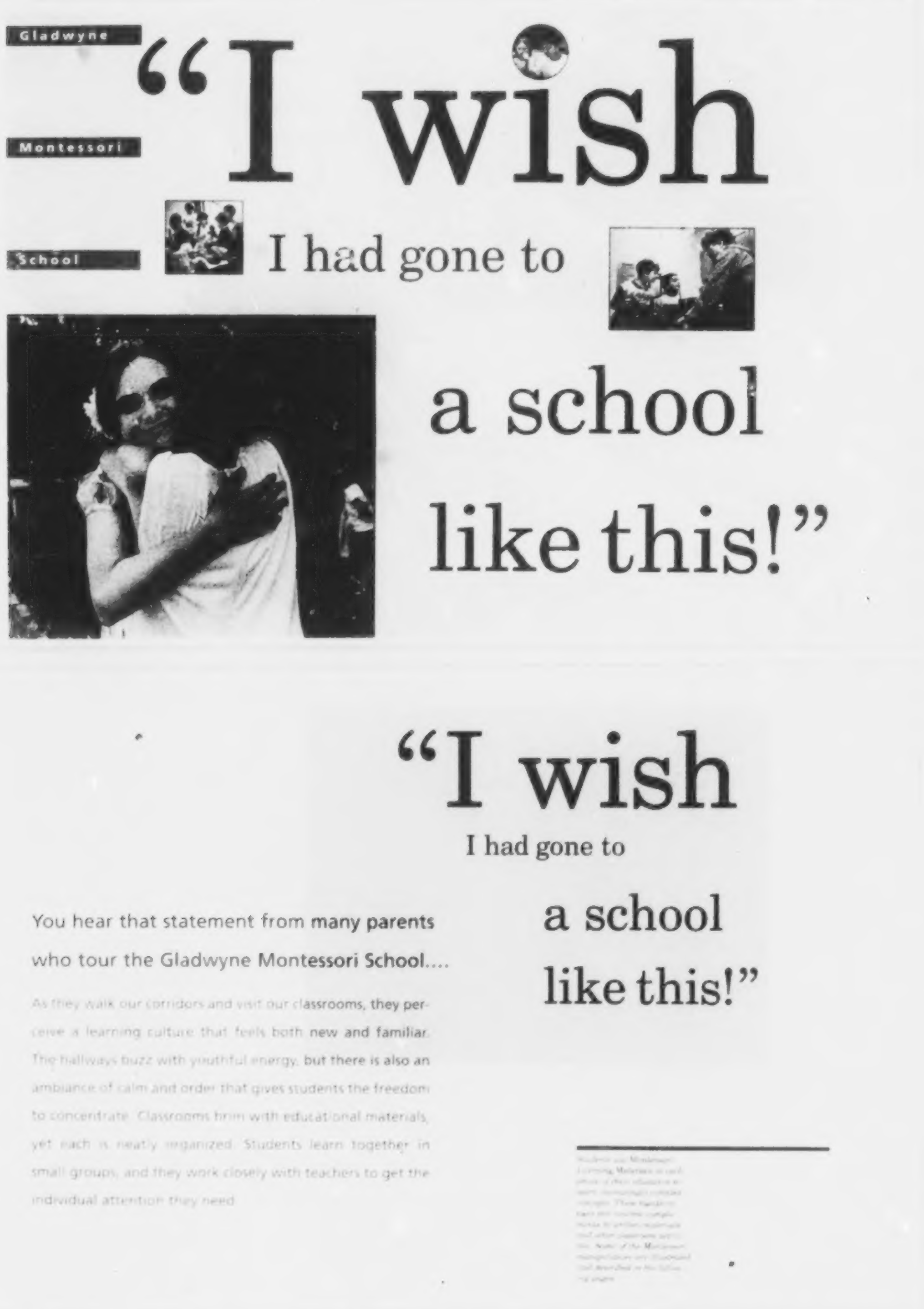
Commercially Prepared Brochure, Gladwyne Montessori School (Gladwyne, PA)



Gladwyne

Montessori

School

"I wish

I had gone to

a school

like this!"

"I wish

I had gone to

a school

like this!"

You hear that statement from **many parents** who tour the Gladwyne **Montessori School**....

As they walk our corridors and visit our classrooms, **they perceive** a learning culture that feels both **new and familiar**. The hallways buzz with youthful energy, **but there is also an** ambiance of calm and order that gives students the freedom to concentrate. Classrooms brim with educational materials, yet each is neatly organized. Students learn together in small groups, and they work closely with teachers to get the individual attention they need.

This 12-page, spiral-bound, 11" x 8½" booklet is printed in multiple colors with black-and-white photos on heavy, coated stock, and includes a pocket on the inside back cover for letter-sized inserts. It combines Montessori-specific graphics, photos of children using Montessori materials, and a jargon-free text for a superb balance of Montessori information and universal appeal.
(front cover and one inside page)

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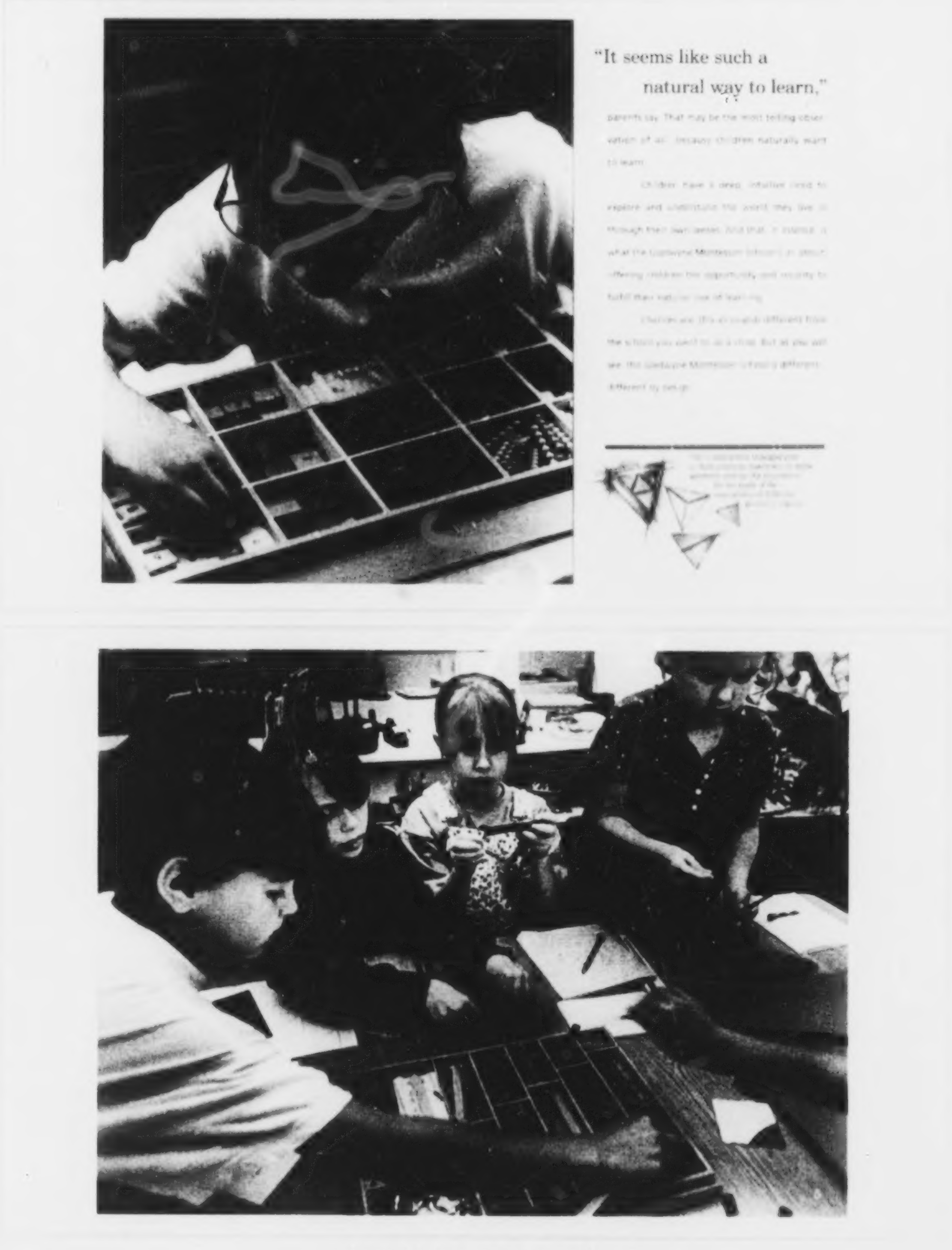
Commercially Prepared Brochure, Gladwyne Montessori School (continued)



"It seems like such a natural way to learn,"

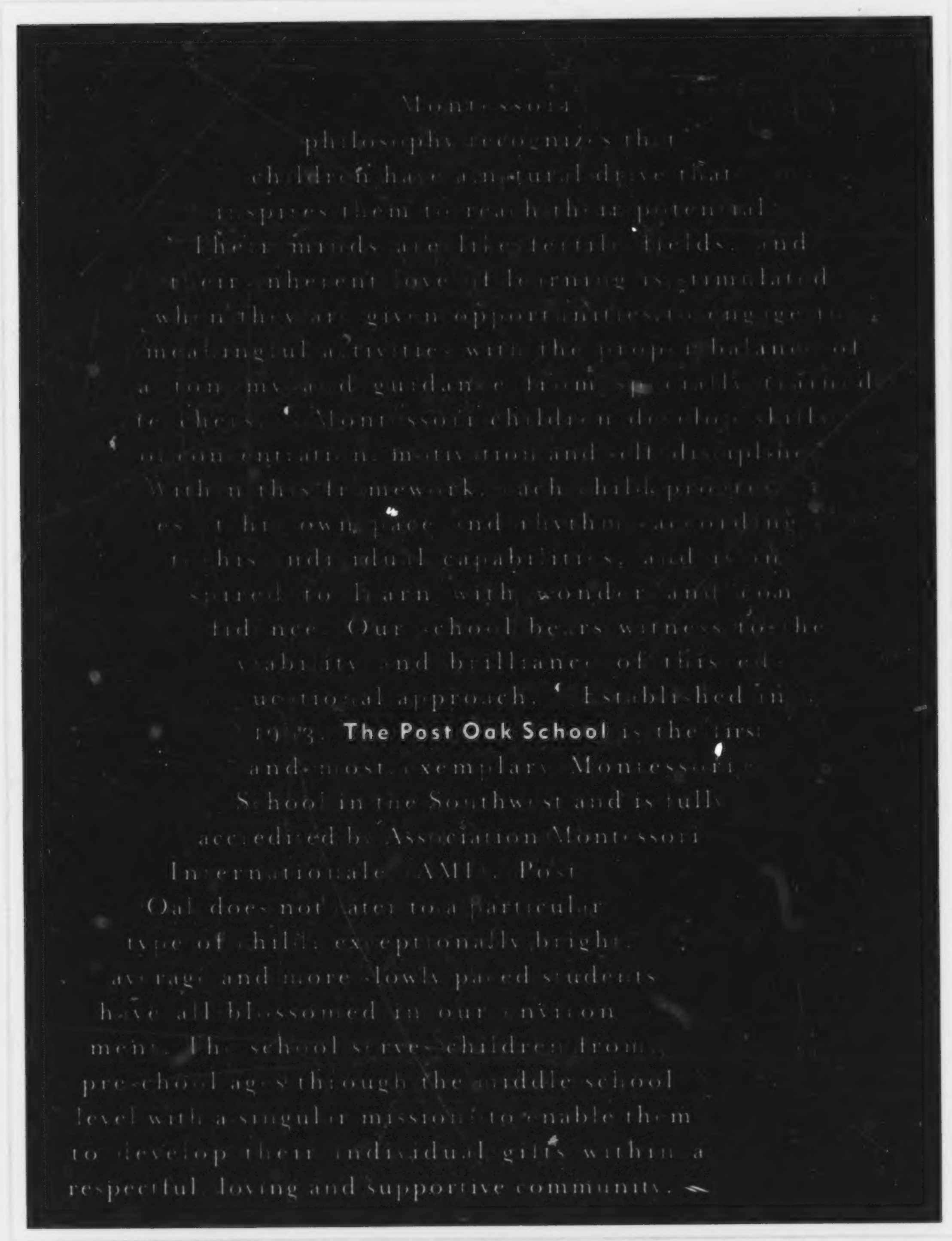
parents say. That may be the most telling observation of all, because children naturally want to learn.

Children have a deep, intuitive need to explore and understand the world they live in through their own senses. And that, in essence, is what the Gladwyne Montessori School is all about: offering children the opportunity and security to fulfill their natural love of learning.

Chances are this all sounds different from the school you went to as a child. But as you will see, the Gladwyne Montessori School is different, different by design.

(an inside two-page spread)

Commercially Prepared Brochure, The Post Oak School (Bellaire, TX)

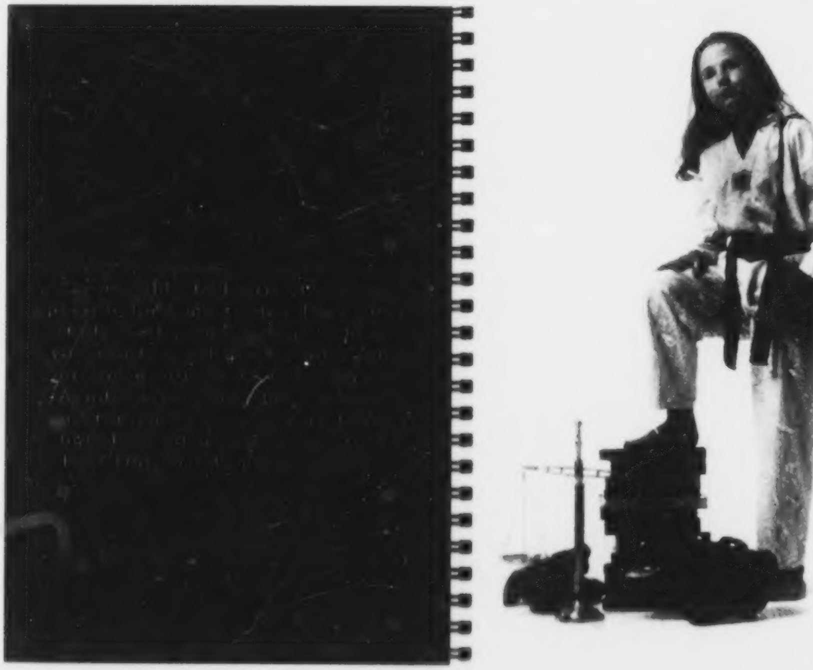


Montessori philosophy recognizes that children have a natural drive that inspires them to reach their potential. "Their minds are like fertile fields, and their inherent love of learning is stimulated when they are given opportunities to engage in meaningful activities with the proper balance of autonomy and guidance from specially trained teachers." Montessori children develop skills of concentration, motivation and self-discipline. Within this framework, each child progresses at his own pace and rhythm according to his individual capabilities, and is inspired to learn with wonder and confidence. Our school bears witness to the viability and brilliance of this educational approach. Established in 1963, **The Post Oak School** is the first and most exemplary Montessori School in the Southwest and is fully accredited by Association Montessori Internationale (AMI). Post Oak does not cater to a particular type of child; exceptionally bright, average and more slowly paced students have all blossomed in our environment. The school serves children from preschool ages through the middle school level with a singular mission: to enable them to develop their individual gifts within a respectful, loving and supportive community.

This 6½" x 8½", spiral-bound, 24-page booklet features black-and-white photos and multicolor text on heavy, uncoated stock. It is a well designed, offbeat, and artistic piece combining testimonials from graduates with terse program descriptions. Its highly professional appearance was made possible in part by the participation of two school families, one in graphic design and the other in photography.

(front cover)

Commercially Prepared Brochure, The Post Oak School (continued)



(two interior two-page spreads)

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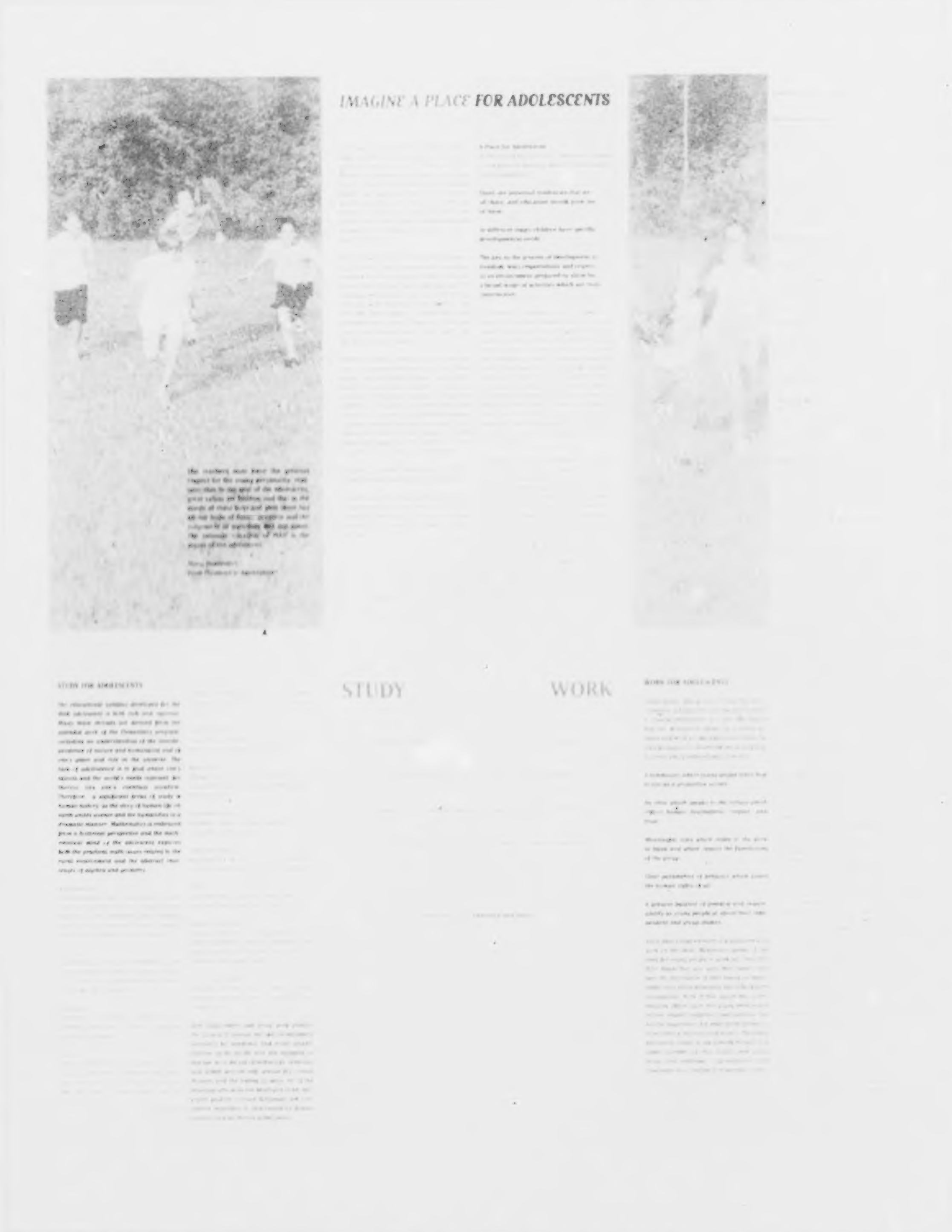
Adolescent Program Poster-Flyer, The Montessori School of Raleigh (Raleigh, NC)



IMAGINE A PLACE FOR ADOLESCENTS

STUDY FOR ADOLESCENTS

STUDY

WORK

WORK FOR ADOLESCENTS

This 21½" x 18" poster-flyer, featuring black-and-white photos, black text, and lavender accents on off-white flecked paper, folds in six sections to 6" x 11" for mailing. It announces a new program level using graphics, photos, and text to pay tribute to the adolescent. The timeline of program development clarifies that the middle school is yet to be realized.
(full poster, inside view)

Adolescent Program Poster-Flyer, The Montessori School of Raleigh (continued)

(inside view, individual panel details)

IMAGINE A PLACE FOR ADOLESCENTS

[illegible]

Pat Ludick

A Place for Adolescents

At the turn of the century Dr. Montessori crafted a new form of education based on three fundamental guidelines.

There are universal tendencies that we all share, and education should grow out of these.

At different stages children have specific developmental needs.

The key to the process of development is freedom, with responsibility and respect, in an environment prepared to allow for a broad scope of activities which are truly constructive.

[illegible]

ADOLESCENTS' KEY EXPERIENCES

Developing Personal Identity

·Developing a positive and separate identity
·Developing the potential human personality
·Blocks of time away from parents and urban area
·Time to reflect: writing a journal, clarification of values and beliefs, exploring the possibilities
·Discovering one's place in community
·Finding success in learning challenges, physical challenges
·Winning and losing: self evaluation and goal setting

Developing the Intellect

·Academic challenge: opportunity to pursue learning, polishing academics
·Exploration of skills learned in Elementary: intellectual problem solving, research and discovery
·Acquire and value intellectual skills and knowledge, develop thinking tools
·Read evocative literature and read more fine books, including the classics
·Discussions, seminars, book discussion, philosophy discussions, shared inquiry, writing and publishing, computing, computer literacy, hands-on science, science experiments, science projects, sex education
·Foreign language

Expressing Oneself

·Art and music, creative arts, crafts, drama, plays, public performance
·Writing and speaking for self expression: communication skills, expression, speaking in a group, debate

Building Community

·Assuming a participatory and responsible role within the community: building a just community, creating community council meetings (participatory democracy, resolution of issues), town meetings
·Group problem solving, cooperative activities, trust activities

Relating to Peers

·Conflict with peers: social problem solving, resolving personal and group issues, teamwork and conflict resolution
·Extended social interchanges, leadership training within the peer group
·Dance and social interaction organized and directed toward purposeful end, preparation for adult relationships

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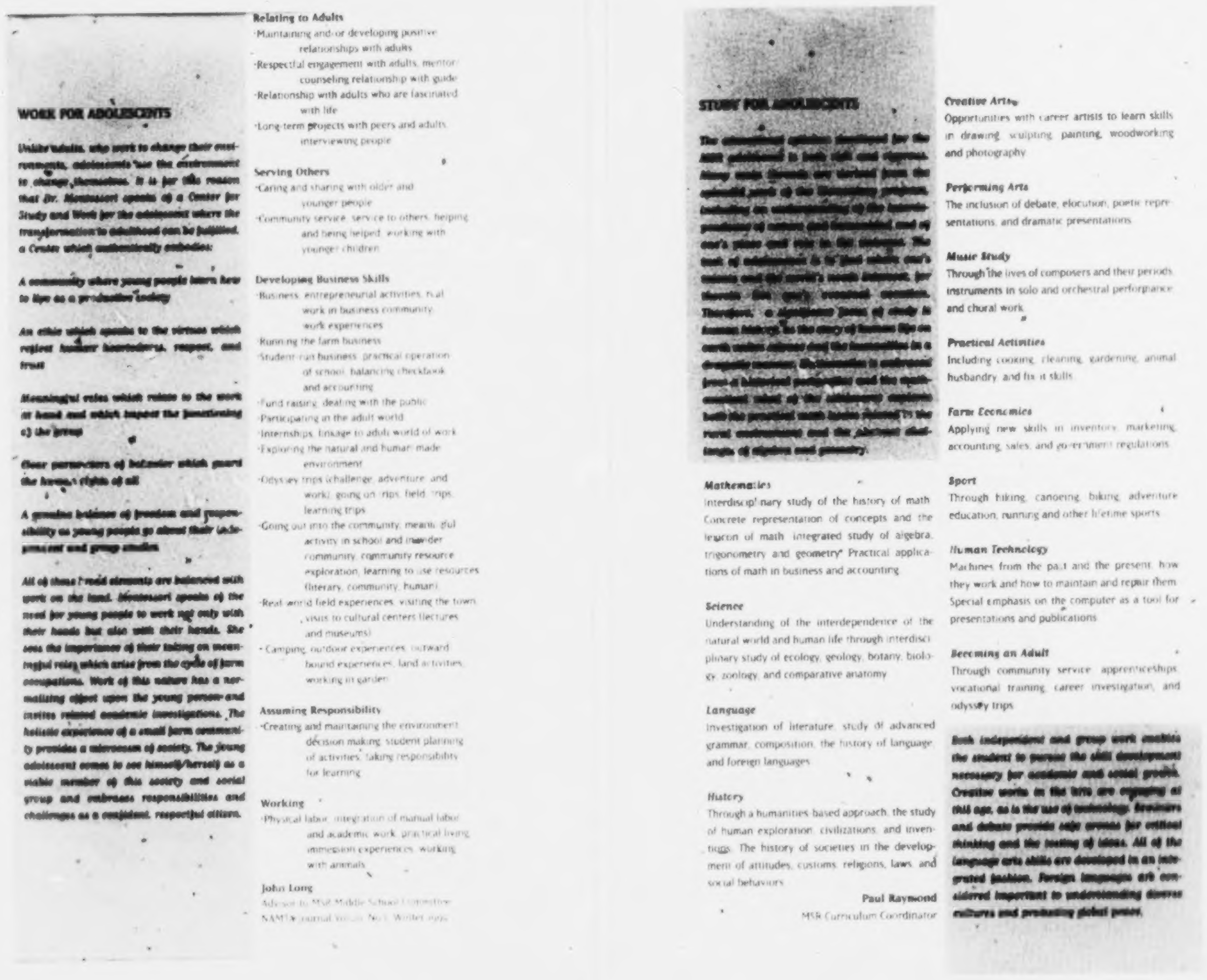
Adolescent Program Poster-Flyer, The Montessori School of Raleigh (continued)

(inside view, individual panel details)



WORK FOR ADOLESCENTS

Unlike adults, who work to change their environments, adolescents use the environment to change themselves. It is for this reason that Dr. Montessori speaks of a Center for Study and Work for the adolescent where the transformation to adulthood can be fulfilled, a Center which authentically embodies:

A community where young people learn how to live as a productive society

An ethic which speaks to the virtues which reflect human heartedness, respect, and trust

Meaningful roles which relate to the work at hand and which impact the functioning of the group

Clear parameters of behavior which guard the human rights of all

A genuine balance of freedom and responsibility as young people go about their independent and group studies

All of these broad elements are balanced with work on the land. Montessori speaks of the need for young people to work not only with their hands but also with their heads. She sees the importance of their taking on meaningful roles which arise from the cycle of farm occupations. Work of this nature has a normalizing effect upon the young person and invites related academic investigations. The holistic experience of a small farm community provides a microcosm of society. The young adolescent comes to see himself/herself as a viable member of this society and social group and embraces responsibilities and challenges as a confident, respectful citizen.

Relating to Adults

- Maintaining and/or developing positive relationships with adults
- Respectful engagement with adults, mentor/counseling relationship with guide
- Relationship with adults who are fascinated with life
- Long-term projects with peers and adults, interviewing people

Serving Others

- Caring and sharing with older and younger people
- Community service, service to others, helping and being helped, working with younger children

Developing Business Skills

- Business, entrepreneurial activities, real work in business community, work experiences
- Running the farm business
- Student-run business, practical operation of school, balancing checkbook and accounting
- Fund raising, dealing with the public
- Participating in the adult world
- Internships, linkage to adult world of work
- Exploring the natural and human-made environment
- Odyssey trips (challenge, adventure, and work), going on trips, field trips, learning trips
- Going out into the community, meaningful activity in school and in wider community, community resource exploration, learning to use resources (literary, community, human)
- Real-world field experiences, visiting the town, visits to cultural centers (lectures and museums)
- Camping, outdoor experiences, outward bound experiences, land activities, working in garden

Assuming Responsibility

- Creating and maintaining the environment, decision making, student planning of activities, taking responsibility for learning

Working

- Physical labor, integration of manual labor and academic work, practical living immersion experiences, working with animals

John Long
Advisor to MSR Middle School Committee
NAMTA Journal Volume [illegible] No. 1, Winter [illegible]

STUDY FOR ADOLESCENTS

The educational syllabus developed for the MSR adolescent is both rich and rigorous. Many main threads are derived from the [illegible] parts of the Elementary program, including an understanding of the interdependency of nature and humankind and of one's place and role in the universe. The task of adolescence is to find where one's [illegible] and the world's needs intersect, for therein lies one's vocational [illegible]. Therefore, a significant focus of study is human history, the story of human life on earth [illegible] and the humanities in a [illegible] manner. Mathematics is embraced from a historical perspective and the [illegible] mind of the adolescent explores both the practical math [illegible] related to the rural environment and the abstract challenges of algebra and geometry.

Mathematics
Interdisciplinary study of the history of math. Concrete representation of concepts and the lexicon of math. Integrated study of algebra, trigonometry and geometry. Practical applications of math in business and accounting.

Science
Understanding of the interdependence of the natural world and human life through interdisciplinary study of ecology, geology, botany, biology, zoology, and comparative anatomy.

Language
Investigation of literature, study of advanced grammar, composition, the history of language, and foreign languages.

History
Through a humanities-based approach, the study of human exploration, civilizations, and inventions. The history of societies in the development of attitudes, customs, religions, laws, and social behaviors.

Paul Raymond
MSR Curriculum Coordinator

Creative Arts
Opportunities with career artists to learn skills in drawing, sculpting, painting, woodworking and photography.

Performing Arts
The inclusion of debate, elocution, poetic representations, and dramatic presentations.

Music Study
Through the lives of composers and their periods, instruments in solo and orchestral performance and choral work.

Practical Activities
Including cooking, cleaning, gardening, animal husbandry, and fix-it skills.

Farm Economics
Applying new skills in inventory, marketing, accounting, sales, and government regulations.

Sport
Through hiking, canoeing, biking, adventure education, running and other lifetime sports.

Human Technology
Machines from the past and the present, how they work and how to maintain and repair them. Special emphasis on the computer as a tool for presentations and publications.

Becoming an Adult
Through community service, apprenticeships, vocational training, career investigation, and odyssey trips.

Both independent and group work enables the student to pursue the skill development necessary for academic and social growth. Creative works in the arts are engaging at this age, as is the use of technology. Seminars and debate provide safe arenas for critical thinking and the testing of ideas. All of the language arts skills are developed in an integrated fashion. Foreign languages are considered important to understanding diverse cultures and promoting global peace.

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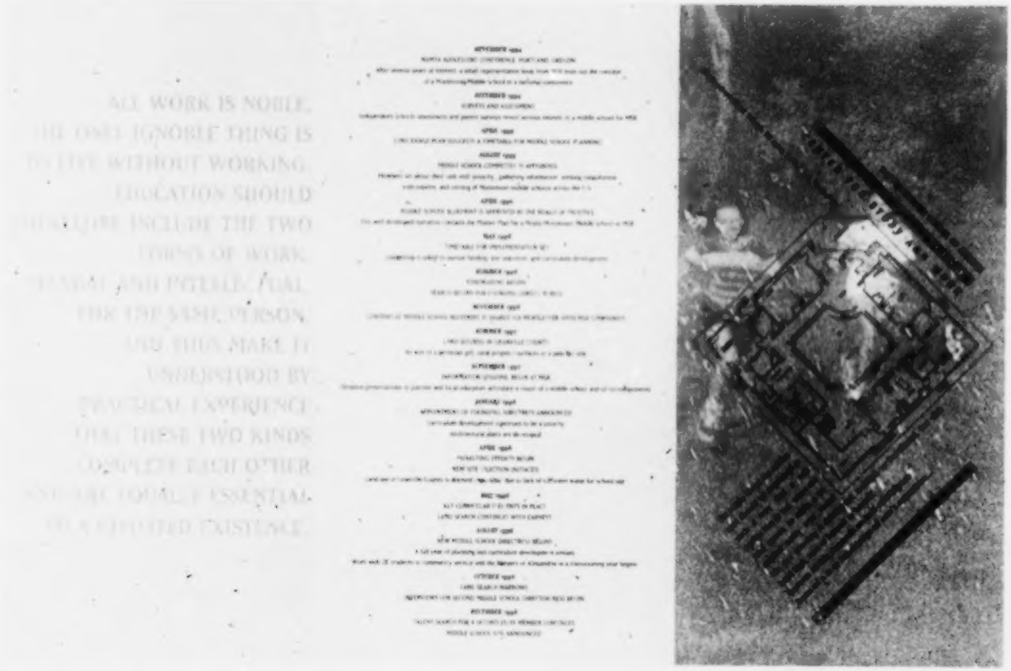
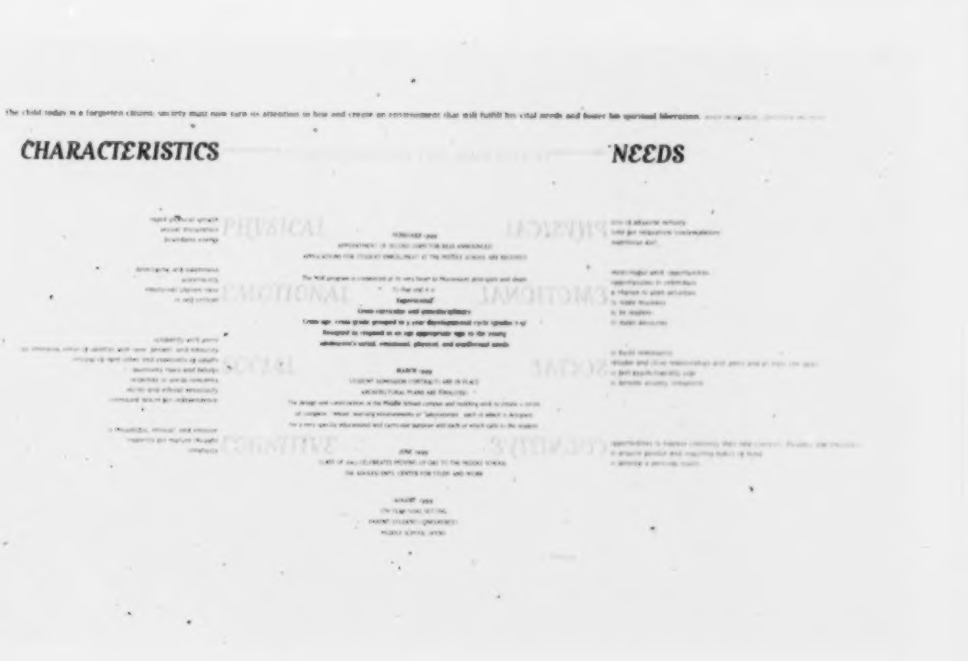
Adolescent Program Poster-Flyer, The Montessori School of Raleigh (continued)



ALL WORK IS NOBLE, THE ONLY IGNOBLE THING IS TO LIVE WITHOUT WORKING. EDUCATION SHOULD THEREFORE INCLUDE THE TWO FORMS OF WORK, MANUAL AND INTELLECTUAL, FOR THE SAME PERSON, AND THUS MAKE IT UNDERSTOOD BY PRACTICAL EXPERIENCE THAT THESE TWO KINDS COMPLETE EACH OTHER AND ARE EQUALLY ESSENTIAL TO A CIVILIZED EXISTENCE.



The child today is a forgotten citizen; society must now turn its attention to him and create an environment that will fulfill his vital needs and foster his spiritual liberation.

CHARACTERISTICS

NEEDS

PHYSICAL

EMOTIONAL

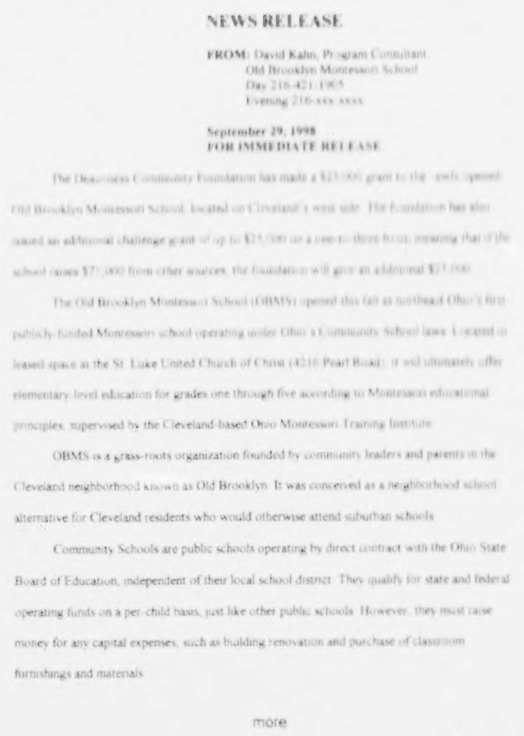
SOCIAL

COGNITIVE

(outside view, top and bottom)

Press Release, Old Brooklyn Montessori School (Cleveland, OH)

This press release announces a major foundation gift and includes promotional information about the school



NEWS RELEASE

FROM: David Kahn, Program Consultant
Old Brooklyn Montessori School
Day 216-421-1905
Evening 216-xxx-xxxx

September 29, 1998
FOR IMMEDIATE RELEASE

The Deaconess Community Foundation has made a $25,000 grant to the newly opened Old Brooklyn Montessori School, located on Cleveland's west side. The foundation has also issued an additional challenge grant of up to $25,000 on a one-to-three basis, meaning that if the school raises $75,000 from other sources, the foundation will give an additional $25,000.

The Old Brooklyn Montessori School (OBMS) opened this fall as northeast Ohio's first publicly-funded Montessori school operating under Ohio's Community School laws. Located in leased space at the St. Luke United Church of Christ (4216 Pearl Road), it will ultimately offer elementary-level education for grades one through five according to Montessori educational principles, supervised by the Cleveland-based Ohio Montessori Training Institute.

OBMS is a grass-roots organization founded by community leaders and parents in the Cleveland neighborhood known as Old Brooklyn. It was conceived as a neighborhood school alternative for Cleveland residents who would otherwise attend suburban schools.

Community Schools are public schools operating by direct contract with the Ohio State Board of Education, independent of their local school district. They qualify for state and federal operating funds on a per-child basis, just like other public schools. However, they must raise money for any capital expenses, such as building renovation and purchase of classroom furnishings and materials.

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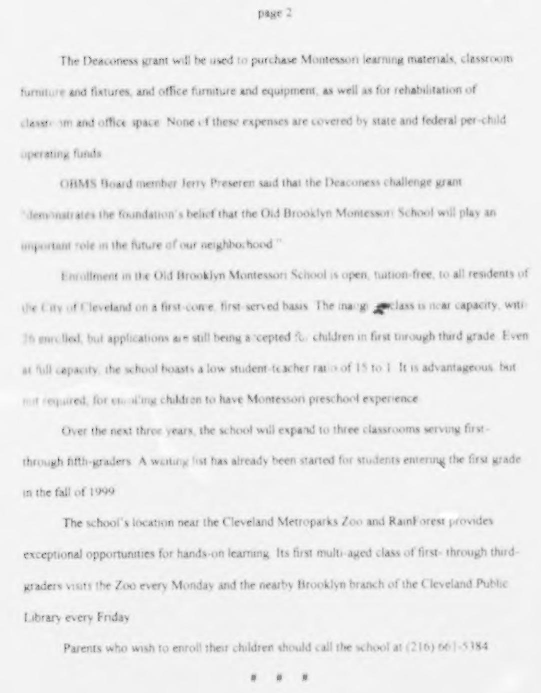

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The Deaconess grant will be used to purchase Montessori learning materials, classroom furniture and fixtures, and office furniture and equipment, as well as for rehabilitation of classroom and office space. None of these expenses are covered by state and federal per-child operating funds.

OBMS Board member Jerry Preseren said that the Deaconess challenge grant "demonstrates the foundation's belief that the Old Brooklyn Montessori School will play an important role in the future of our neighborhood."

Enrollment in the Old Brooklyn Montessori School is open, tuition-free, to all residents of the City of Cleveland on a first-come, first-served basis. The inaugural class is near capacity, with 26 enrolled, but applications are still being accepted for children in first through third grade. Even at full capacity, the school boasts a low student-teacher ratio of 15 to 1. It is advantageous, but not required, for enrolling children to have Montessori preschool experience.

Over the next three years, the school will expand to three classrooms serving first- through fifth-graders. A waiting list has already been started for students entering the first grade in the fall of 1999.

The school's location near the Cleveland Metroparks Zoo and RainForest provides exceptional opportunities for hands-on learning. Its first multi-aged class of first- through third-graders visits the Zoo every Monday and the nearby Brooklyn branch of the Cleveland Public Library every Friday.

Parents who wish to enroll their children should call the school at (216) 661-5384.

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Admissions, Enrollment, and Family Records

Introduction

From the very first contact, the admissions process begins to bring Montessori education into full view for the parent. The school is presented for its entire plan of education, not just the preschool or entry point. The head of school shows a total interest in the family and its members' individual needs while conveying the necessary principles of Montessori education, helping parents arrive at a match between Montessori education and their child.

Admissions affect far more than the financial bottom line; a clearly conceived admissions plan is critical to the health of the school and its program. For example, Montessori classrooms require a careful balance of ages, with most children beginning by age three and completing a three-year cycle at each level. Therefore, admission of children four years or older without Montessori experience must be carefully considered in light of both the individual child and the school community.

The Admissions Director

The head of school may function as the admissions director or, especially in larger schools, may delegate the position to someone else. It is important to have a designated admissions person who is able to personalize each transaction with incoming applicants while maintaining an overview of places to be filled. The admissions director can sign the letters for each phase of the admissions process, lending a personal touch to the applicant's initial relationship with the school. Through student references and checking with previous teachers, the admissions director must also be able to determine when a student (especially an applicant without Montessori background) should not be admitted. Finally, the admissions director must work with teachers to help determine placement so that classes have a good cross-section of students.

Because of their close relations with new parents, admissions directors have good working knowledge of the school community for future volunteer projects and parent education needs.

First Steps

Phone Inquiries

The first contact is often a parent's phone call to the school. This conversation creates a first impression of the school. Parents are seeking facts about the school's program, but they also glean important information from the tone and manner of the response.

Information is recorded during the initial phone call to permit later follow-up. An application packet should be mailed the same day. In some cases, an observation appointment may be scheduled.

Open House

See Chapter 6 for detailed information on advertising and conducting an open house

Open house invitations should be sent to everyone who has made an inquiry call. Open houses should be held several times per year and can include a brief introductory presentation as well as a tour of the school's facilities.

Visits/Observations

Seeing a Montessori classroom in action provides vital information for a prospective parent. Many schools require classroom observation as part of their admission process. Although parents of young children will be most interested in observing a class at their child's age level, it is recommended that they also briefly observe classrooms of other levels. This provides a first-hand impression of the continuum of a child's experience at the school.

Observation appointments are scheduled in advance and teachers notified. Observers receive a confirmation call and are greeted upon arrival. Guidelines for respectful observation are briefly discussed before the parents enter the classrooms (see observation guidelines in this chapter's Sample Documents).

Phone Inquiry Information:

- Child's name
- Child's age and birth date
- Parents' names
- Address
- Phone (home and work)
- Applying for what level?
- How did you hear of our school?
- Observation scheduled
- Notes

Following observations, parents need to discuss their impressions. Often the observation will have brought to light their misconceptions about Montessori ("Where are the toys?"). Many parents are overwhelmed by the variety of tasks they observe and by the children's high level of independent engagement. Underlying their questions is usually the concern that their own child will not fit into the kind of program they are seeing. A vital part of the observation, therefore, is a post-observation discussion, during which the head of school or admissions director explains the training of Montessori teachers, their skills of presenting, and the *gradual* adaptation of the child to the work of the classroom. Children are all different, and each child finds a place in an environment that is scaled to his or her individual needs. It is at the observation that the real questions of "match" between parent and program often emerge.

Before parents depart, the next steps in the admissions process are clearly outlined. Following the observation might be a good time for parents to tour the whole school again, with new eyes that allow them to see children at different age levels showing increasing skills and independence as pointed out by the head or admissions director.

Making Application

Ideally, a decision to make application is indication of a family's embrace of the principles integral to a Montessori program. If the first steps have provided ample opportunity for parents to learn about the school, submitting an application form is a solid statement of intent.

Application forms should clearly state the school's nondiscrimination policy. Racial discrimination may result in money damages, loss of the school's tax-exempt status, and admission of the applicants involved.

See Chapter 2 for a discussion of applicable Internal Revenue Service rules and procedures for nondiscriminatory admissions.

Application generally consists of a completed application form, authorization for request of student records or profiles from previous schools, and payment of a non-refundable application fee. An application initiates a second series of steps designed to provide more intensive exploration and discussion, leading to a clear decision regarding enrollment.

Tracking the Admissions Process

Typically, applications are moved through a series of transactions: 1) phone intake, 2) open house, 3) observation, 4) application and fee received, 5) interview, 6) letter of acceptance sent, 7) enrollment form and tuition deposit received, 8) placed on waiting list, etc. Entering all transactions into a database allows for printing of periodic reports for use in making follow-up calls to move each applicant on to the next step in the process.

The Interview

Purpose of Interview

Montessori schools have a specific approach to interviews, which is often distinct from that of other private schools. The purpose of the interview is not to judge the child or the family or to select the "best" students from a pool of applicants. Rather, interviews are designed as interactions to gain more information about the family and the child and to share more information about the school with parents. The major focus of the interview is to determine congruence of values and goals between home and school. Secondarily, the interview helps to determine the readiness of the child for the classroom experience.

PARENT INTERVIEW OUTLINE

This interview outline from Northwoods Montessori School (Atlanta, GA) gives typical questions and discussion topics for interviewing parents.

- How did you become interested in the Montessori program?
- What are your hopes/expectations for your child in a Montessori class? (Discuss self-motivation, active learning, total development)
- Tell me a little about your child: daily routine, independence, favorite activities.
- Has your child had experience being away from you? (Briefly discuss separation)
- *If older child:* Describe your child's previous school experience. Is your child involved in any activities outside of school?
- Explain developmental cycles, three-year spans, mixed-age groups.
- Discuss discipline, evaluation techniques.
- Does your child have any special needs that the school should be aware of?
- Will your child be enrolled in our Extended Day program? (Describe)
- We are a nonprofit school which requires parent participation. We ask each family to attend parent meetings and study groups and to contribute approximately ten volunteer hours per year. Would you be willing to make the time for this type of commitment? (Refer to application form)

When admitting toddlers or three-year-olds, many schools interview only the parents prior to making an admission decision. An interview/visit with the child is conducted later, once placement has been determined and shortly before the anticipated enrollment date. Other schools have a teacher conduct a short interview with the young child before deciding upon admission.

Montessori education is a continuum experience, with children ideally enrolling by age three. Successful admission of older children requires careful consideration of the child's ability to adapt to the Montessori environment. Optimal Montessori programs ensure that the majority of children in a class have experienced the full Montessori sequence.

In the case of an older child, it is always advisable to have an interview and/or classroom visit with the child in addition to an interview with the parents. In most circumstances, references from other schools will also be considered when admitting an older child.

Parent Interview

The head of school or admissions director, who conveys a sense of the school as a whole, usually conducts parent interviews. If there are two parents in the family, both are asked to attend, emphasizing from the beginning the importance of all adults working in support of the child. The major emphasis of the discussion is to communicate the key principles of Montessori education. By exploring the school's program and the parents' goals for their child, the interviewer and family are now reaching a final determination of whether there is a "good fit." The interviewer helps to determine the "fit" or "match" by asking questions pertaining to the parents' attitudes about discipline; their understanding of the importance of character development, not just academics; their dedication to time spent with their child; and their understanding of their child's needs.

Interview schedules should be relaxed in order to encourage questions and extended conversation. A good interview focuses on initiating parents into the Montessori community, not merely selling the school. Ultimately, the goal is for parents to make an informed choice for the right reasons. That kind of admission decision translates into families committed to the school's philosophy and the continuity of its program. At the end of the interview, the interviewer clarifies the remaining steps of the admissions procedure.

Interview/Visit with Young Child (Toddlers and Three-Year-Olds)

It is difficult to glean accurate information about a young child when interviewed in a new and strange setting. Much of the information about a child's readiness comes from the parent interview. If the child is of the appropriate age, the general rule is to admit according to date of application, determining placement in a manner that preserves the appropriate balance of age and gender in the classrooms. In this case the child's first interview becomes an orientation visit.

If a school does decide to interview young children prior to making an admission decision, it is important to clearly articulate the purpose. An interview is designed to gain information about the child. Since the Montessori emphasis is on developing a child's potential, an interview should not be a screening technique in which the young child is judged against a set of specific criteria. In the case of a teacher who does recommend denying admission to a child based on a negative first impression, the admissions director or head of school must play advocate for fairness to the applicant and for upholding first-come, first-served admissions, if that is the school's policy. Interviews with young children are generally conducted one-on-one by a teacher in an age-appropriate classroom. In some cases, a school may have several teachers interview a small group of children. Although the child is encouraged to separate from the parent, the parent should be invited to accompany the child if either demonstrates anxiety about the separation. Following the interview, the teacher notes observations on a simple form (see Lexington Montessori School observation form in this chapter's Sample Documents).

Interview/Visit with Child Age Four or Older

Much reliable information can be learned from an older child in an interview. And, unlike the young child, the older child plays a significant role in the decision making. For this reason, it is recommended that the interview include a classroom visit, whereby the child experiences the real life of the class and the teacher can observe the child within the context of the class community. Through one-on-one exchange, the teacher can assess strengths and weaknesses in skill levels as well as attitudes, behavior style, and interests. The teacher notes observations on a form, including a general recommendation.

Acceptance and Placement

Acceptance Timeline/Age Requirements

An accurate school census is critical to the admissions process. The census determines which current students plan to re-enroll (see Enrollment, below). New students are then accepted according to spaces available in specific age levels, usually on a first-come, first-served basis. Siblings of current or former students are usually given priority admission. Schools admit the majority of new students at the start of the school year. Although some schools accept only for enrollment in September, others have several specific admission periods during the year or a rolling admissions policy. When space permits, schools usually accommodate students who are transferring from another Montessori school due to family relocation in the middle of a school year.

In determining acceptance timelines and age requirements, Montessori principles dictate a focus on the developmental needs of the child. Because developmental changes occur rapidly in young children, many schools have a flexible acceptance timeline for toddlers and three-year-olds. This allows the child who may be too "young" at the start of school to enter later in the year. Readiness is determined by language expression, level of independence, and self-motivation. In some cases, the minimum age for enrollment is determined by state licensing regulations.

Chronological Age versus Readiness

Because Montessori values each child's uniqueness, Montessori schools may place students according to readiness, not age, and may, at the discretion of the teacher, enroll some children into the preschool program as young as 2½. Such flexibility could be consistent throughout the program, allowing transitions (from preschool to elementary, lower elementary to upper elementary, etc.) to be at the teacher's discretion in consultation with the parents. The free flow between each age grouping and the next helps to build a seamless developmental continuum and is the basis for the child's being responsible for his or her own preparation for the next stage.

The disadvantage to this approach usually occurs when parents equate readiness with intelligence and are upset when peers of their child are advanced ahead of their child. They feel there is stigma attached to being left behind, and sometimes this is really the case. This is why larger schools often submit to chronological age as the final determinant for student advancement, which usually means that the student must have had a birthday by September or October to move on to the next level. Even with this approach, it is still possible to make exceptions based on readiness, keeping in mind the aim of placing each child in the most appropriate environment.

Acceptance Letter

Admissions decisions are communicated in writing. Formal acceptance requires a response from parents within two to three weeks, accompanied by a tuition deposit. A carefully composed letter for students who are not accepted conveys respect and goodwill (see the deny-admission letter in this chapter's Sample Documents).

Wait Lists

Because schools sometimes experience attrition between enrollment and the start of school, a certain number of vacancies is anticipated. Therefore, after classes are filled, some students may still be accepted on a wait list. Students are prioritized on the list according to date of application within their specific age level. Letters to parents whose child is accepted on the wait list give a reasonable estimate of the likelihood of enrollment. No deposit is required until a space is available.

In establishing acceptance limits for classes, some schools will overbook by one or two students per class to allow for attrition between enrollment and the start of school. This means, however, that the school is committed to enroll these students even if the expected attrition does not occur.

Placement Decisions

Placement decisions are made once all accepted students have been identified. The optimal dynamic in a Montessori class calls for careful balance of age, gender, and the diverse needs and contributions of the children. Teachers should be actively involved in placement decisions because they have intimate knowledge of their own classroom communities. However, the head's involvement is also important for the broader view of the school population.

Parent requests for a specific teacher should not be solicited; some parents, however, do have strong preferences for placement, and their input should be welcomed and taken into consideration. Sibling placement in the same or separate classrooms should never be arbitrary; parents and teachers know those siblings who benefit each other and those who do not. Children with special needs should be dispersed among the classes in order to ensure adequate teacher attention and contribute to the diversity of class communities.

Placement decisions are communicated in writing to parents. Teachers can follow up with personal calls to each family, providing clear information about the orientation process and schedule.

See Chapter 8 for more information on the orientation process

Enrollment

Enrollment is an annual process for every student in the school, both those who are returning and those newly admitted. Enrollment is a covenant between family and school. Parents make a legal commitment by signing a tuition contract. Other forms and records are also updated during enrollment.

Returning Students

Current students are given first priority for enrollment in the following year. Parents indicate their intention to enroll and submit a tuition deposit with a new tuition contract. This re-enrollment generally occurs in February or March. After the re-enrollment deadline, the school can accurately determine the number of spaces available for new children. The school clearly informs current families that a place will not be reserved for a child who is not re-enrolled by the stated deadline. During re-enrollment, parents also register for ancillary services (early arrival, full day, transportation, etc.)

New Students

See Chapter 3 for more information on tuition contracts and new-family fees.

New children are enrolled after returning students. Parents sign a tuition contract and register for any ancillary services. In some schools, new families pay a one-time fee upon entering the school. Occasionally, this fee is a no-interest deposit that may be returned to the family when the child leaves the school. Most schools use new-family fees for capital expenditures.

In addition to the tuition contract, new families may be asked to sign a form that delineates the parents' responsibilities as partners with the school (see commitment form and pedagogical agreement in this chapter's Sample Documents).

Financial Aid

See Chapter 3 for more information on how to finance scholarships.

Financial aid is one way to encourage diversity in the school community. Aid is usually in the form of tuition reduction rather than full tuition grants. Some schools award financial aid only to continuing students in order to allow families to continue their child's Montessori experience through the entire program. Other schools target a percentage of funds for new students in order to foster greater socio-economic diversity in the school population.

Parents fill out a financial aid application that is separate from the application for admission. Schools may develop their own forms or use a national service (i.e. School and Student Service for Financial Aid). Documentation such as a 1040 tax form is usually requested. Financial aid awards are communicated via letter to parents at the time of enrollment and parents must indicate their decision to accept or decline the award.

School and Student Service for Financial Aid assists schools in collecting and analyzing data necessary for the equitable distribution of financial aid on the basis of need. It is administered by the Educational Testing Service (Princeton, NJ) on behalf of the National Association of Independent Schools (NAIS). See Appendix 4 for contact information.

Child/Family Records

A number of additional forms and records are gathered during enrollment or prior to the start of the school year:

- Family profiles or parent questionnaires to provide a developmental history of the child for later reference in the case of educational or psychological questions.

- Medical information forms to collect information required by state or local health agencies.
- Student release form, specifying the persons who have parental authorization to pick the child up from school.
- Emergency contact form.
- Authorization for emergency treatment of the child by a specific doctor at a specific facility as well as for alternative doctors/facilities when the parent's choice is not available.
- Permission forms: transportation, field trips, photographs, etc.

See Chapter 10 for more detailed information on policies relating to medications, emergencies, field trip safety, etc.

While release, authorization, and permission forms are intended as deterrents to litigation, they are not foolproof. An attorney should be consulted when they are initially formulated.

Summary

Admissions is at the heart of the school's program. The admissions policy and procedures are a clear articulation of "who we are." The way in which children and families come to the school sets the stage for their ongoing interactions within the school. The admissions process brings families and school staff into dialogue and into each other's lives–all centered around the child.

Frequently Asked Questions

Is Montessori right for all children?

Montessori believes in the developmental potential of each individual. But Montessori may not be right for all families. A positive experience for the child requires that the parents and school share a common view of the purpose of education. Some parents may be attracted to a school because they equate Montessori with academic acceleration. Others may see Montessori as a non-structured smorgasbord for kids. If parents enroll their child for the wrong reasons, they will not be happy–their child will experience tension–and, in many cases, they may leave the school before completing the program.

Ideally, the aim is to enroll children (and their families) for the full continuum of the Montessori program in order to maximize their development. So it is imperative that schools approach admissions in a manner that clearly defines Montessori philosophy and goals. They should encourage parents to ask the hard questions and to talk about their reservations as well as their hopes. Schools want families to know why they think the Montessori experience is best for children, but they cannot expect all families to share this view. It is important to listen carefully to parents and, when necessary, to suggest that the Montessori school will not meet their expectations for their child's education.

What about children age four and older without Montessori background?

Montessori education is built upon stages of development. The experiences of the child during the first stage affect development at the next and subsequent stages. Therefore, the curriculum at each level significantly incorporates the learning and experience of the previous level.

Montessori programs build from the base, enrolling most children before age four in order to respond to the unique sensitivities and capacities of the young child. The integrity of the program depends upon the majority of children having a full continuum of Montessori experience from age three. In such well-established programs, older children without Montessori background can be successfully admitted. This is often the case in schools with elementary or emerging adolescent levels.

When admitting an older child, it is especially important to explore the parents' and the child's motivation. In addition to interviews, records from previous schools and discussions with former teachers give a clearer picture of the child's experience. If there have been problems in other schools, careful discussion and assessment is particularly important. Montessori is not a panacea for all problems. Yet some children who have been unhappy in a previous school setting are very successful in the Montessori environment. The key is for the teachers, parents, and child to have realistic expectations and to be willing to work cooperatively in making a transition.

How do we fill spaces at upper levels that occur due to attrition?

It is normal in Montessori schools to factor in anticipated attrition when planning enrollment. Because the curriculum is built upon the preschool, it is expected that a Montessori school will have fewer classes at the upper levels due to natural attrition. Most schools show about 60%-70% retention of their students from an existing preschool to a new elementary or from an existing elementary to a new adolescent program. Once the programs mature, retention rates can rise to 70%-90% or even higher.

It usually takes two preschool classes to begin one elementary class (one of these could be a "feeder" school, a nearby Montessori preschool that does not have an elementary program). Some small schools with only one preschool operate an elementary class with fewer than the desired nine or ten peers. Likewise, it usually takes two lower elementary classes to build an upper elementary and two upper elementary classes to build an adolescent program, but some schools have started with fewer students or drawn students from feeder schools.

When adding children to established elementary classrooms, those without Montessori backgrounds usually cannot exceed 10% without a negative impact on the quality of Montessori practice. Board members must understand that admissions is more than merely filling all available spaces. In fact, there may be occasions when it is advisable to under-enroll for one year in order to strengthen the balance of students in a particular class.

Further Reading from NAMTA

The following articles and documents are available as photocopies from NAMTA. See Appendix 4 for ordering information.

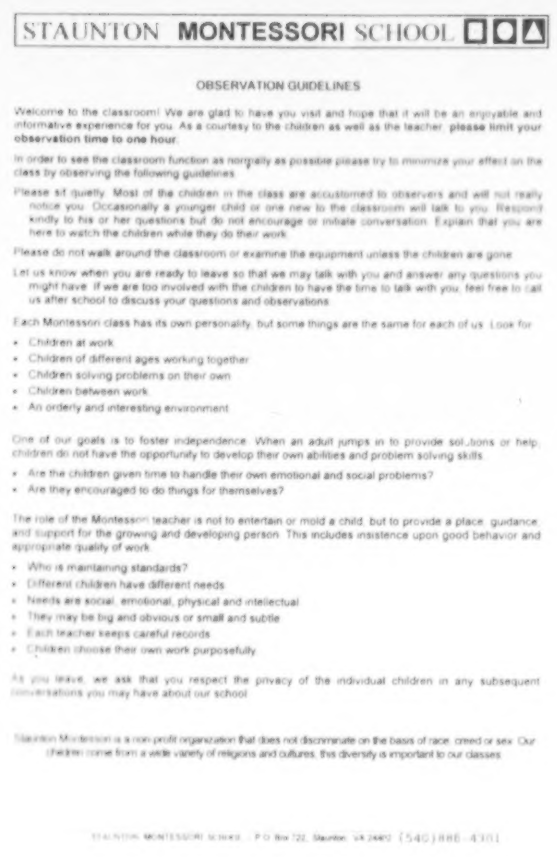
Dubble, Sharon L. "Linking the Family and the School: The Importance of Parental Choice in Admissions." *The NAMTA Journal* 20.2 (1995, Spring): 21-26. 4 total pages.

Sample Documents

The following documents illustrate common practices in Montessori school operations. To view documents at full size, photocopy and enlarge.

Prospective Parent Observation Guidelines, Staunton Montessori School (Staunton, VA)

This set of guidelines, targeted to prospective parents, provides succinct instructions for unobtrusive observation and includes some pointers of Montessori philosophy and how a visitor might see this philosophy expressed in the life of the classroom. Of special interest is the accompanying observer questionnaire.



STAUNTON MONTESSORI SCHOOL

OBSERVATION GUIDELINES

Welcome to the classroom! We are glad to have you visit and hope that it will be an enjoyable and informative experience for you. As a courtesy to the children as well as the teacher, **please limit your observation time to one hour.**

In order to see the classroom function as normally as possible please try to minimize your effect on the class by observing the following guidelines.

Please sit quietly. Most of the children in the class are accustomed to observers and will not really notice you. Occasionally a younger child or one new to the classroom will talk to you. Respond kindly to his or her questions but do not encourage or initiate conversation. Explain that you are here to watch the children while they do their work.

Please do not walk around the classroom or examine the equipment unless the children are gone.

Let us know when you are ready to leave so that we may talk with you and answer any questions you might have. If we are too involved with the children to have the time to talk with you, feel free to call us after school to discuss your questions and observations.

Each Montessori class has its own personality, but some things are the same for each of us. Look for:

- Children at work
- Children of different ages working together
- Children solving problems on their own
- Children between work
- An orderly and interesting environment

One of our goals is to foster independence. When an adult jumps in to provide solutions or help, children do not have the opportunity to develop their own abilities and problem solving skills.

- Are the children given time to handle their own emotional and social problems?
- Are they encouraged to do things for themselves?

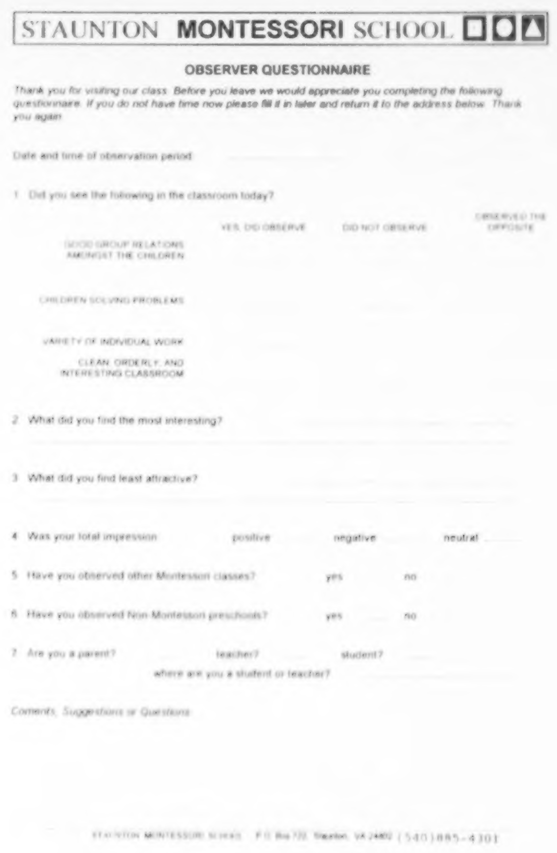
The role of the Montessori teacher is not to entertain or mold a child, but to provide a place, guidance, and support for the growing and developing person. This includes insistence upon good behavior and appropriate quality of work.

- Who is maintaining standards?
- Different children have different needs
- Needs are social, emotional, physical and intellectual
- They may be big and obvious or small and subtle
- Each teacher keeps careful records
- Children choose their own work purposefully

As you leave, we ask that you respect the privacy of the individual children in any subsequent conversations you may have about our school.

Staunton Montessori is a non-profit organization that does not discriminate on the basis of race, creed or sex. Our children come from a wide variety of religions and cultures; this diversity is important to our classes.

STAUNTON MONTESSORI SCHOOL · P.O. Box 722, Staunton, VA 24402 (540)886-4301



STAUNTON MONTESSORI SCHOOL

OBSERVER QUESTIONNAIRE

Thank you for visiting our class. Before you leave we would appreciate you completing the following questionnaire. If you do not have time now please fill it in later and return it to the address below. Thank you again.

Date and time of observation period ____________

1. Did you see the following in the classroom today?

	YES, DID OBSERVE	DID NOT OBSERVE	OBSERVED THE OPPOSITE
GOOD GROUP RELATIONS AMONGST THE CHILDREN			
CHILDREN SOLVING PROBLEMS			
VARIETY OF INDIVIDUAL WORK			
CLEAN, ORDERLY, AND INTERESTING CLASSROOM			

2. What did you find the most interesting? ____________

3. What did you find least attractive? ____________

4. Was your total impression positive ____ negative ____ neutral ____

5. Have you observed other Montessori classes? yes ____ no ____

6. Have you observed Non Montessori preschools? yes ____ no ____

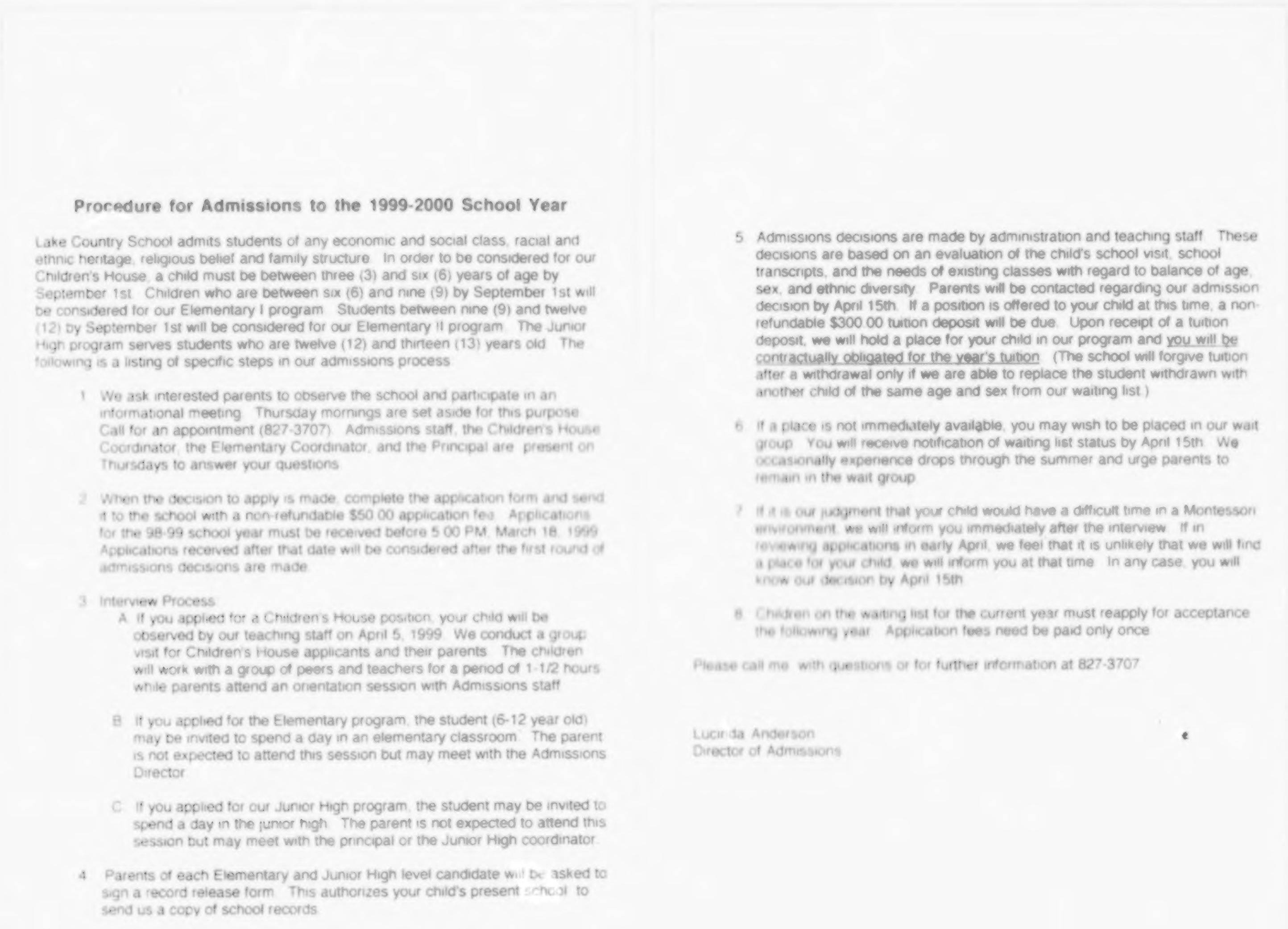
7. Are you a parent? ____ teacher? ____ student? ____
where are you a student or teacher? ____________

Coments, Suggestions or Questions:

STAUNTON MONTESSORI SCHOOL · P.O. Box 722, Staunton, VA 24402 (540)885-4301

Admissions Procedure, Lake Country School (Minneapolis, MN)

Procedures for admissions are clearly outlined in this letter



Procedure for Admissions to the 1999-2000 School Year

Lake Country School admits students of any economic and social class, racial and ethnic heritage, religious belief and family structure. In order to be considered for our Children's House, a child must be between three (3) and six (6) years of age by September 1st. Children who are between six (6) and nine (9) by September 1st will be considered for our Elementary I program. Students between nine (9) and twelve (12) by September 1st will be considered for our Elementary II program. The Junior High program serves students who are twelve (12) and thirteen (13) years old. The following is a listing of specific steps in our admissions process.

1. We ask interested parents to observe the school and participate in an informational meeting. Thursday mornings are set aside for this purpose. Call for an appointment (827-3707). Admissions staff, the Children's House Coordinator, the Elementary Coordinator, and the Principal are present on Thursdays to answer your questions.

2. When the decision to apply is made, complete the application form and send it to the school with a non-refundable $50.00 application fee. Applications for the 98-99 school year must be received before 5:00 PM, March 18, 1999. Applications received after that date will be considered after the first round of admissions decisions are made.

3. Interview Process:
   A. If you applied for a Children's House position, your child will be observed by our teaching staff on April 5, 1999. We conduct a group visit for Children's House applicants and their parents. The children will work with a group of peers and teachers for a period of 1-1/2 hours while parents attend an orientation session with Admissions staff.

   B. If you applied for the Elementary program, the student (6-12 year old) may be invited to spend a day in an elementary classroom. The parent is not expected to attend this session but may meet with the Admissions Director.

   C. If you applied for our Junior High program, the student may be invited to spend a day in the junior high. The parent is not expected to attend this session but may meet with the principal or the Junior High coordinator.

4. Parents of each Elementary and Junior High level candidate will be asked to sign a record release form. This authorizes your child's present school to send us a copy of school records.

5. Admissions decisions are made by administration and teaching staff. These decisions are based on an evaluation of the child's school visit, school transcripts, and the needs of existing classes with regard to balance of age, sex, and ethnic diversity. Parents will be contacted regarding our admission decision by April 15th. If a position is offered to your child at this time, a non-refundable $300.00 tuition deposit will be due. Upon receipt of a tuition deposit, we will hold a place for your child in our program and you will be contractually obligated for the year's tuition. (The school will forgive tuition after a withdrawal only if we are able to replace the student withdrawn with another child of the same age and sex from our waiting list.)

6. If a place is not immediately available, you may wish to be placed in our wait group. You will receive notification of waiting list status by April 15th. We occasionally experience drops through the summer and urge parents to remain in the wait group.

7. If it is our judgment that your child would have a difficult time in a Montessori environment, we will inform you immediately after the interview. If in reviewing applications in early April, we feel that it is unlikely that we will find a place for your child, we will inform you at that time. In any case, you will know our decision by April 15th.

8. Children on the waiting list for the current year must reapply for acceptance the following year. Application fees need be paid only once.

Please call me with questions or for further information at 827-3707.

Lucinda Anderson
Director of Admissions

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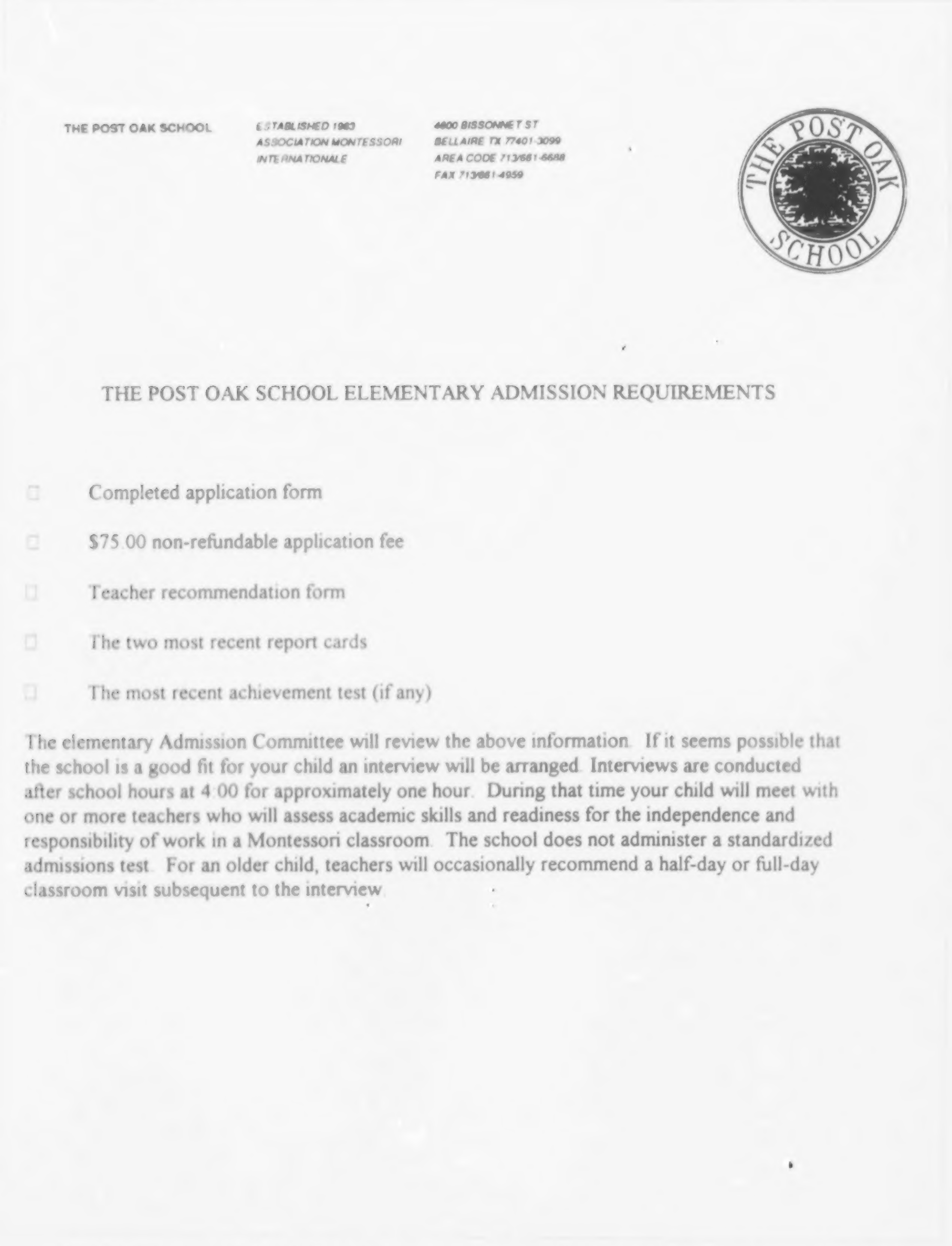
Elementary Admissions Checklist, The Post Oak School (Bellaire, TX)



THE POST OAK SCHOOL

ESTABLISHED 1963
ASSOCIATION MONTESSORI
INTERNATIONALE

4600 BISSONNET ST
BELLAIRE TX 77401-3099
AREA CODE 713/661-6688
FAX 713/661-4959

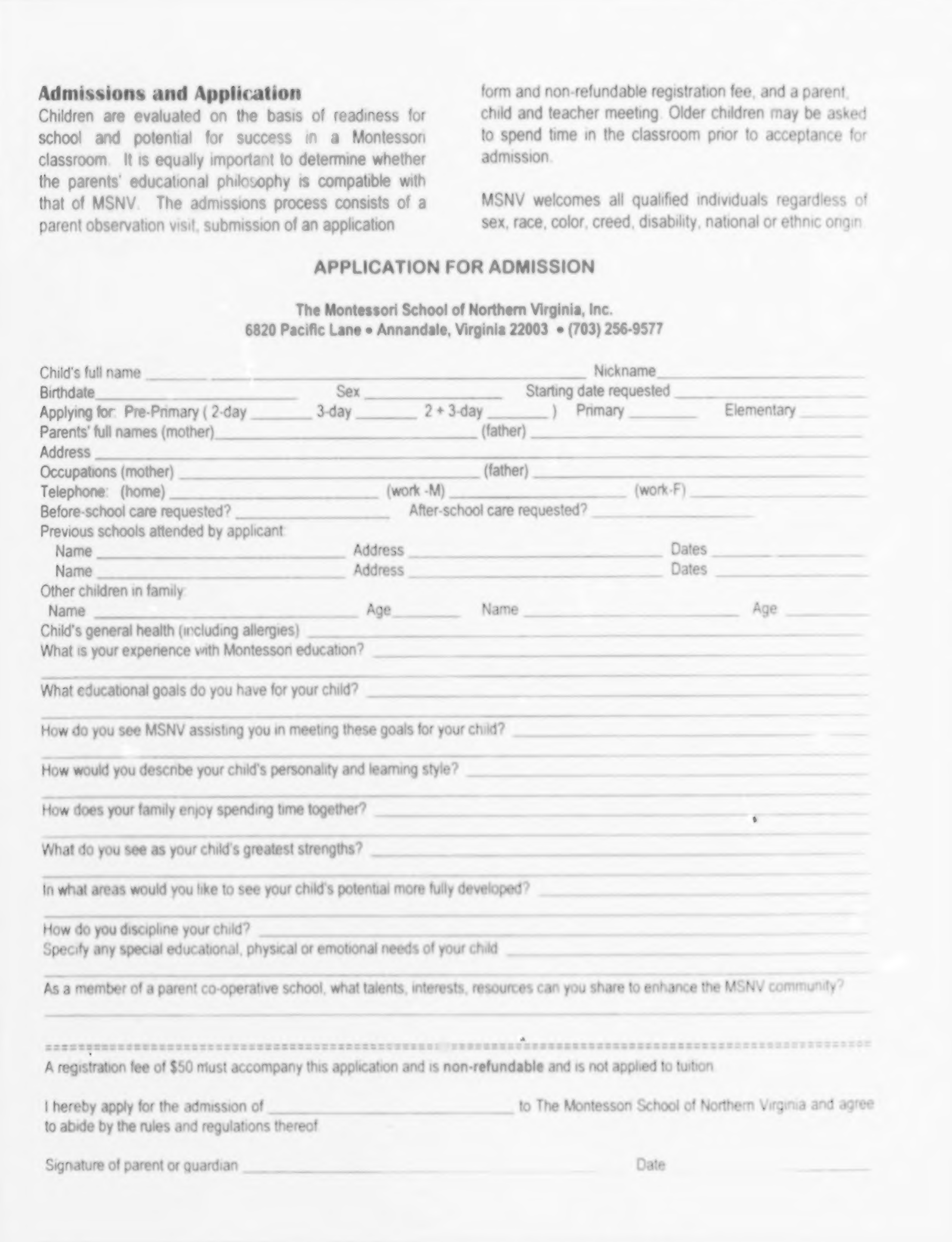
THE POST OAK SCHOOL ELEMENTARY ADMISSION REQUIREMENTS

- ☐ Completed application form
- ☐ $75.00 non-refundable application fee
- ☐ Teacher recommendation form
- ☐ The two most recent report cards
- ☐ The most recent achievement test (if any)

The elementary Admission Committee will review the above information. If it seems possible that the school is a good fit for your child an interview will be arranged. Interviews are conducted after school hours at 4:00 for approximately one hour. During that time your child will meet with one or more teachers who will assess academic skills and readiness for the independence and responsibility of work in a Montessori classroom. The school does not administer a standardized admissions test. For an older child, teachers will occasionally recommend a half-day or full-day classroom visit subsequent to the interview.

Specific requirements for elementary admissions are detailed in a convenient checklist format.

Application, Montessori School of Northern Virginia (Annandale, VA)



Admissions and Application

Children are evaluated on the basis of readiness for school and potential for success in a Montessori classroom. It is equally important to determine whether the parents' educational philosophy is compatible with that of MSNV. The admissions process consists of a parent observation visit, submission of an application form and non-refundable registration fee, and a parent, child and teacher meeting. Older children may be asked to spend time in the classroom prior to acceptance for admission.

MSNV welcomes all qualified individuals regardless of sex, race, color, creed, disability, national or ethnic origin.

APPLICATION FOR ADMISSION

The Montessori School of Northern Virginia, Inc.
6820 Pacific Lane • Annandale, Virginia 22003 • (703) 256-9577

Child's full name ______________ Nickname ______________
Birthdate ______________ Sex ______________ Starting date requested ______________
Applying for: Pre-Primary (2-day ______ 3-day ______ 2 + 3-day ______) Primary ______ Elementary ______
Parents' full names (mother) ______________ (father) ______________
Address ______________
Occupations (mother) ______________ (father) ______________
Telephone: (home) ______________ (work -M) ______________ (work-F) ______________
Before-school care requested? ______________ After-school care requested? ______________
Previous schools attended by applicant:
Name ______________ Address ______________ Dates ______________
Name ______________ Address ______________ Dates ______________
Other children in family:
Name ______________ Age ______ Name ______________ Age ______
Child's general health (including allergies) ______________
What is your experience with Montessori education? ______________
What educational goals do you have for your child? ______________
How do you see MSNV assisting you in meeting these goals for your child? ______________
How would you describe your child's personality and learning style? ______________
How does your family enjoy spending time together? ______________
What do you see as your child's greatest strengths? ______________
In what areas would you like to see your child's potential more fully developed? ______________
How do you discipline your child? ______________
Specify any special educational, physical or emotional needs of your child ______________
As a member of a parent co-operative school, what talents, interests, resources can you share to enhance the MSNV community? ______________

A registration fee of $50 must accompany this application and is **non-refundable** and is not applied to tuition.

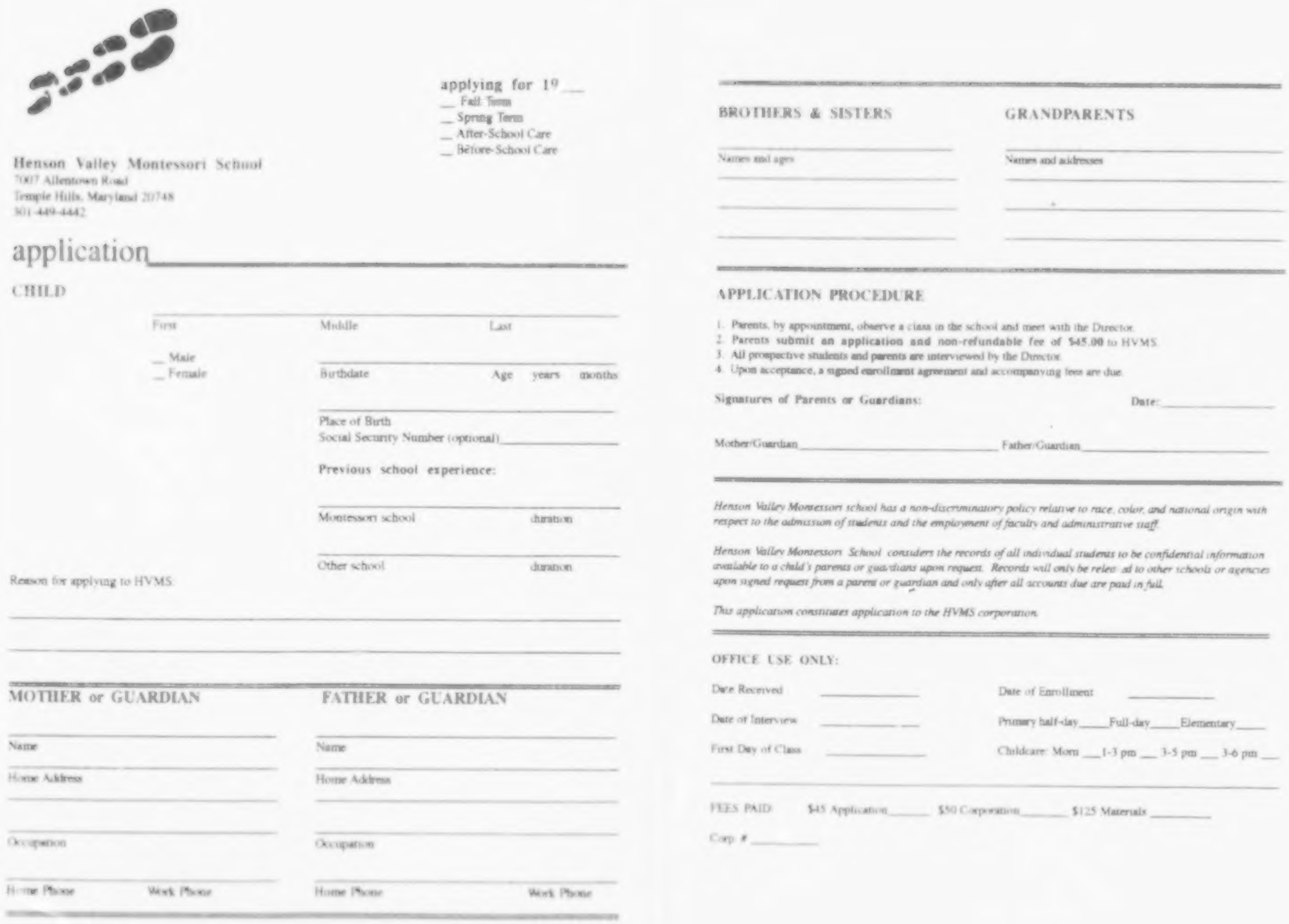
I hereby apply for the admission of ______________ to The Montessori School of Northern Virginia and agree to abide by the rules and regulations thereof.

Signature of parent or guardian ______________ Date ______________

The basis for acceptance is clearly articulated on this application form.

Application, Henson Valley Montessori School (Temple Hills, MD)

This concise application form lists admissions procedures and includes a space for office use in tracking the application process.



applying for 19 __
__ Fall Term
__ Spring Term
__ After-School Care
__ Before-School Care

Henson Valley Montessori School
7007 Allentown Road
Temple Hills, Maryland 20748
301-449-4442

application

CHILD

First Middle Last

__ Male
__ Female

Birthdate Age years months

Place of Birth
Social Security Number (optional)____________

Previous school experience:

Montessori school duration

Other school duration

Reason for applying to HVMS:

MOTHER or GUARDIAN

Name
Home Address

Occupation
Home Phone Work Phone

FATHER or GUARDIAN

Name
Home Address

Occupation
Home Phone Work Phone

BROTHERS & SISTERS

Names and ages

GRANDPARENTS

Names and addresses

APPLICATION PROCEDURE

1. Parents, by appointment, observe a class in the school and meet with the Director.
2. **Parents submit an application and non-refundable fee of $45.00** to HVMS.
3. All prospective students and parents are interviewed by the Director.
4. Upon acceptance, a signed enrollment agreement and accompanying fees are due.

Signatures of Parents or Guardians: Date:____________

Mother/Guardian____________________ Father/Guardian____________________

Henson Valley Montessori school has a non-discriminatory policy relative to race, color, and national origin with respect to the admission of students and the employment of faculty and administrative staff.

Henson Valley Montessori School considers the records of all individual students to be confidential information available to a child's parents or guardians upon request. Records will only be released to other schools or agencies upon signed request from a parent or guardian and only after all accounts due are paid in full.

This application constitutes application to the HVMS corporation.

OFFICE USE ONLY:

Date Received ____________
Date of Interview ____________
First Day of Class ____________
Date of Enrollment ____________
Primary half-day_____Full-day_____Elementary_____
Childcare: Morn ___1-3 pm ___ 3-5 pm ___ 3-6 pm ___

FEES PAID: $45 Application______ $50 Corporation_______ $125 Materials _________

Corp # _________

27[illegible]

27[illegible]

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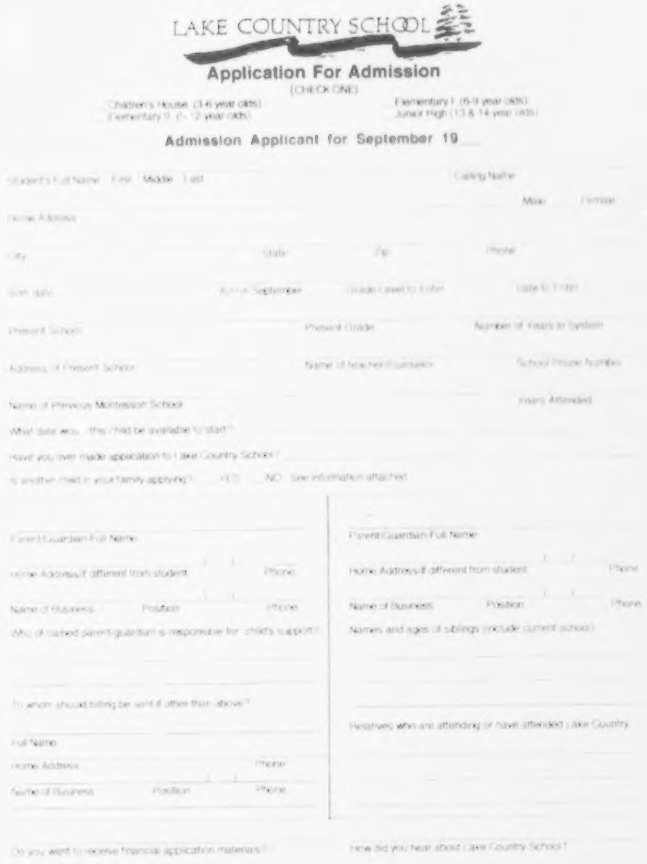
Application, Lake Country School (Minneapolis, MN)

This application form includes questions to provide a basic family/child profile



LAKE COUNTRY SCHOOL

Application For Admission

(CHECK ONE)

___ Children's House (3-6 year olds)
___ Elementary II (9-12 year olds)
___ Elementary I (6-9 year olds)
___ Junior High (13 & 14 year olds)

Admission Applicant for September 19___

Student's Full Name First Middle Last ___ Calling Name ___
___ Male ___ Female
Home Address ___
City ___ State ___ Zip ___ Phone ___
Birth date ___ Age in September ___ Grade Level to Enter ___ Date to Enter ___
Present School ___ Present Grade ___ Number of Years in System ___
Address of Present School ___ Name of teacher/counselor ___ School Phone Number ___
Name of Previous Montessori School ___ Years Attended ___
What date would this child be available to start? ___
Have you ever made application to Lake Country School? ___
Is another child in your family applying? ___ YES ___ NO See information attached

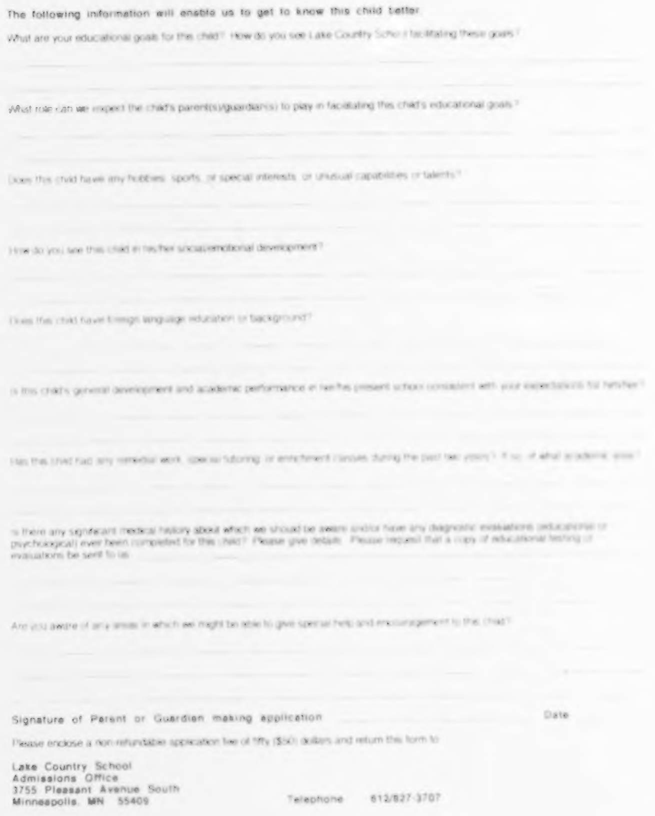
Parent/Guardian Full Name ___
Home Address/if different from student ___ Phone ( ) ___
Name of Business ___ Position ___ Phone ( ) ___
Who of named parent/guardian is responsible for child's support? ___

To whom should billing be sent if other than above? ___
Full Name ___
Home Address ___ Phone ___
Name of Business ___ Position ___ Phone ( ) ___

Parent/Guardian Full Name ___
Home Address/if different from student ___ Phone ( ) ___
Name of Business ___ Position ___ Phone ( ) ___
Names and ages of siblings (include current school) ___

Relatives who are attending or have attended Lake Country ___

Do you want to receive financial application materials? ___
How did you hear about Lake Country School? ___



The following information will enable us to get to know this child better.

What are your educational goals for this child? How do you see Lake Country School facilitating these goals? ___

What role can we expect the child's parent(s)/guardian(s) to play in facilitating this child's educational goals? ___

Does this child have any hobbies, sports, or special interests, or unusual capabilities or talents? ___

How do you see this child in his/her social/emotional development? ___

Does this child have foreign language education or background? ___

Is this child's general development and academic performance in her/his present school consistent with your expectations for him/her? ___

Has this child had any remedial work, special tutoring, or enrichment classes during the past two years? If so, of what academic area? ___

Is there any significant medical history about which we should be aware and/or have any diagnostic evaluations (educational or psychological) ever been completed for this child? Please give details. Please request that a copy of educational testing or evaluations be sent to us. ___

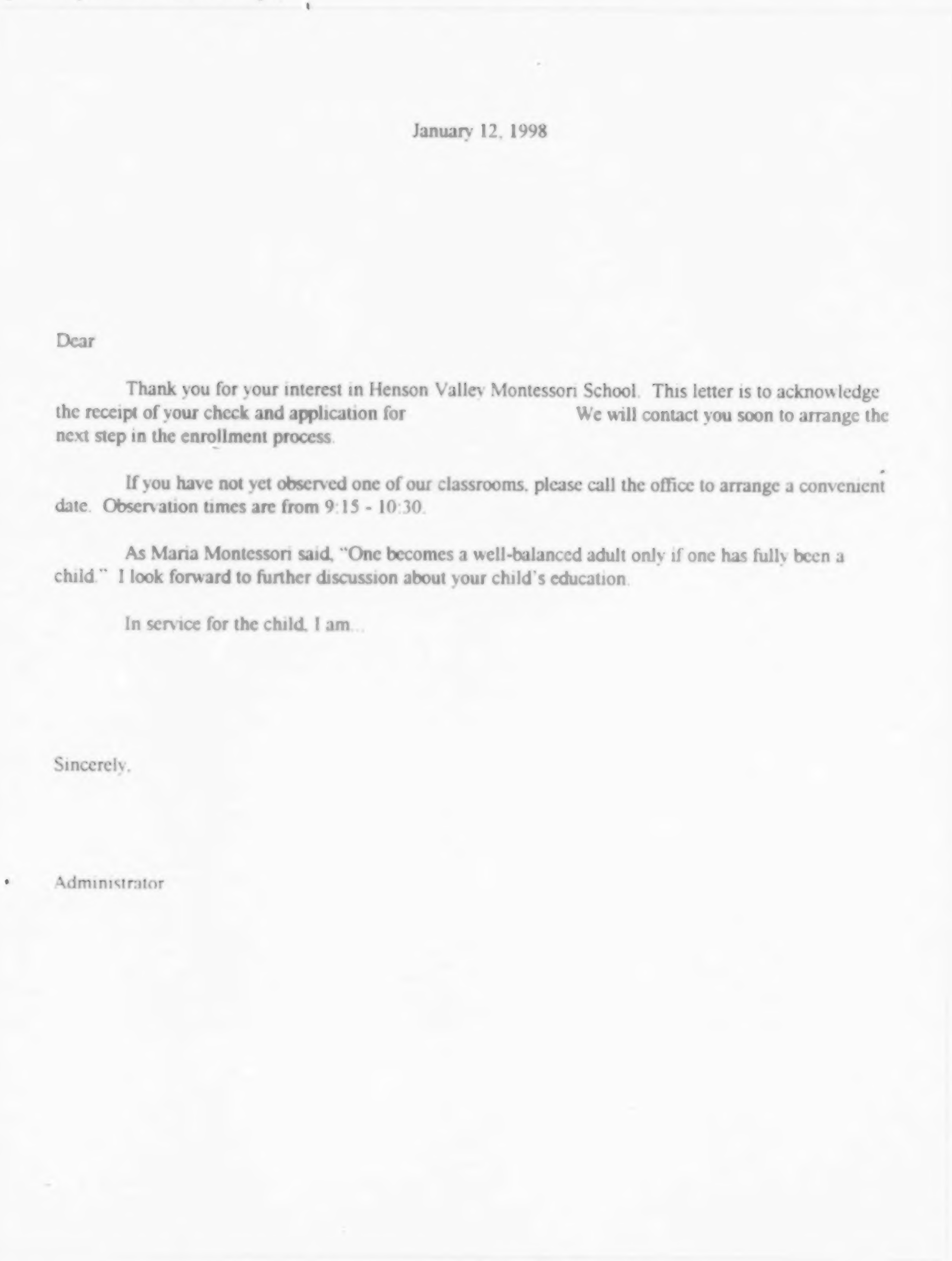
Are you aware of any areas in which we might be able to give special help and encouragement to this child? ___

Signature of Parent or Guardian making application ___ **Date** ___

Please enclose a non-refundable application fee of fifty ($50) dollars and return this form to:

Lake Country School
Admissions Office
3755 Pleasant Avenue South
Minneapolis, MN 55409
Telephone 612/827-3707

Acknowledgement Letter, Henson Valley Montessori School (Temple Hills, MD)



January 12, 1998

Dear

Thank you for your interest in Henson Valley Montessori School. This letter is to acknowledge the receipt of your check and application for We will contact you soon to arrange the next step in the enrollment process.

If you have not yet observed one of our classrooms, please call the office to arrange a convenient date. Observation times are from 9:15 - 10:30.

As Maria Montessori said, "One becomes a well-balanced adult only if one has fully been a child." I look forward to further discussion about your child's education.

In service for the child, I am...

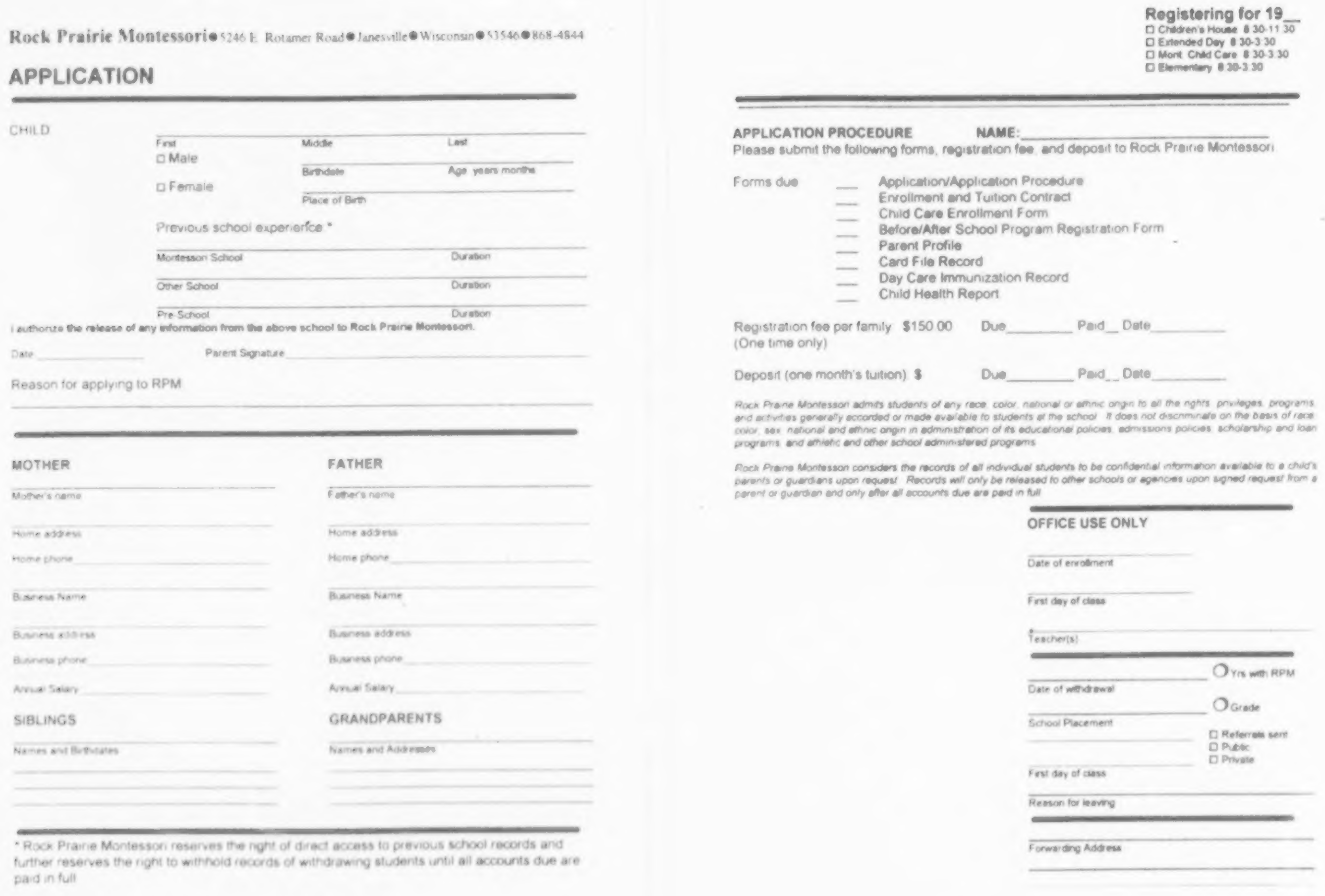
Sincerely,

Administrator

This simple letter acknowledges receipt of application.

Application, Rock Prairie Montessori School (Janesville, WI)

This application form includes authorization for release of previous school records



Rock Prairie Montessori ● 5246 E. Rotamer Road ● Janesville ● Wisconsin ● 53546 ● 868-4844

APPLICATION

CHILD

First ______ Middle ______ Last ______

☐ Male

Birthdate ______ Age years months ______

☐ Female

Place of Birth ______

Previous school experience *

Montessori School ______ Duration ______

Other School ______ Duration ______

Pre-School ______ Duration ______

I authorize the release of any information from the above school to Rock Prairie Montessori.

Date ______ Parent Signature ______

Reason for applying to RPM ______

MOTHER

Mother's name ______

Home address ______

Home phone ______

Business Name ______

Business address ______

Business phone ______

Annual Salary ______

FATHER

Father's name ______

Home address ______

Home phone ______

Business Name ______

Business address ______

Business phone ______

Annual Salary ______

SIBLINGS

Names and Birthdates ______

GRANDPARENTS

Names and Addresses ______

* Rock Prairie Montessori reserves the right of direct access to previous school records and further reserves the right to withhold records of withdrawing students until all accounts due are paid in full

Registering for 19__

☐ Children's House 8 30-11 30
☐ Extended Day 8 30-3 30
☐ Mont. Child Care 8 30-3 30
☐ Elementary 8 30-3 30

APPLICATION PROCEDURE **NAME:** ______

Please submit the following forms, registration fee, and deposit to Rock Prairie Montessori

Forms due
___ Application/Application Procedure
___ Enrollment and Tuition Contract
___ Child Care Enrollment Form
___ Before/After School Program Registration Form
___ Parent Profile
___ Card File Record
___ Day Care Immunization Record
___ Child Health Report

Registration fee per family $150 00 (One time only) Due______ Paid__ Date______

Deposit (one month's tuition) $ Due______ Paid__ Date______

Rock Prairie Montessori admits students of any race, color, national or ethnic origin to all the rights, privileges, programs and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, sex, national and ethnic origin in administration of its educational policies, admissions policies, scholarship and loan programs, and athletic and other school administered programs.

Rock Prairie Montessori considers the records of all individual students to be confidential information available to a child's parents or guardians upon request. Records will only be released to other schools or agencies upon signed request from a parent or guardian and only after all accounts due are paid in full.

OFFICE USE ONLY

Date of enrollment ______

First day of class ______

Teacher(s) ______

Date of withdrawal ______ ○ Yrs with RPM

School Placement ______ ○ Grade

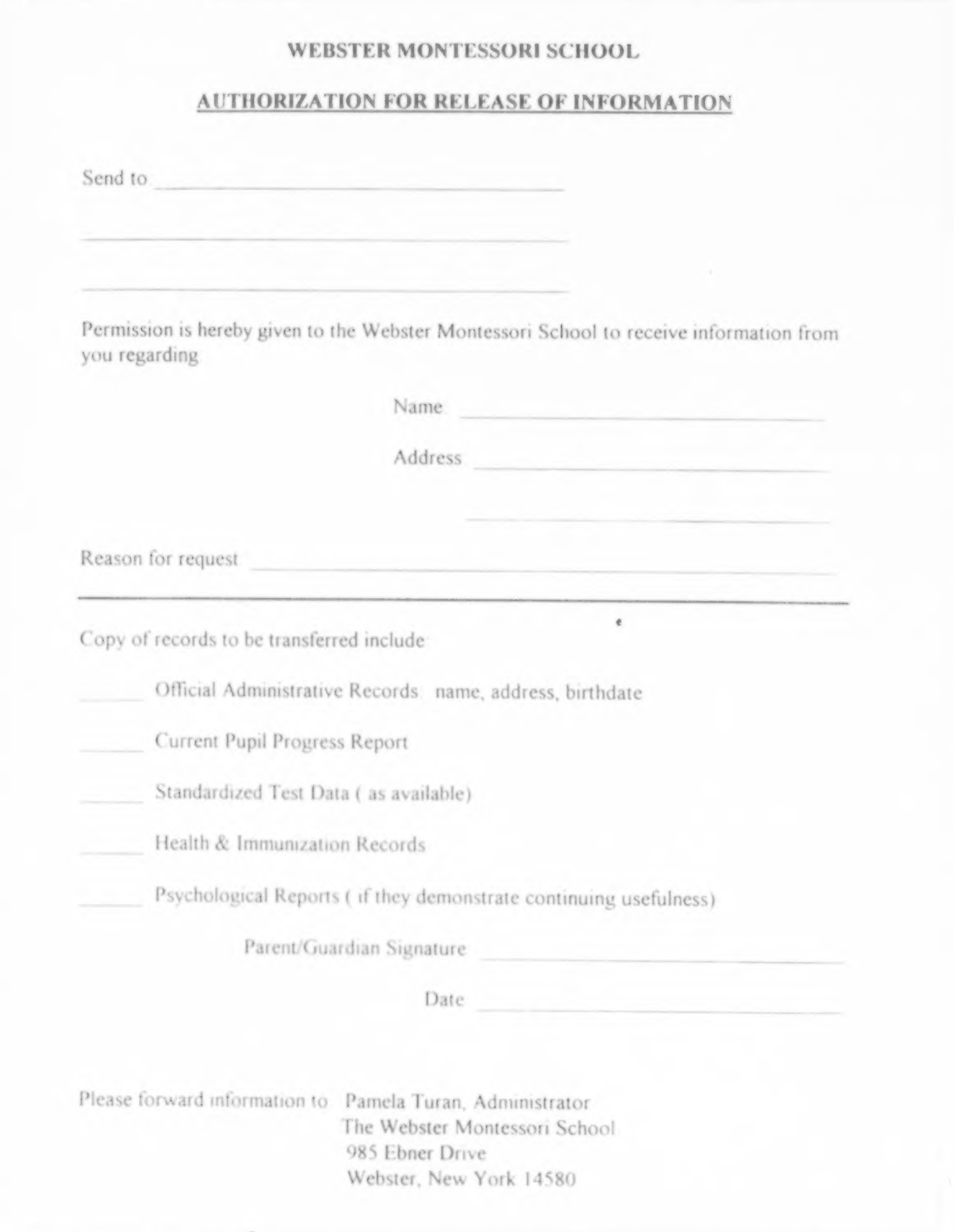
☐ Referrals sent
☐ Public
☐ Private

First day of class ______

Reason for leaving ______

Forwarding Address ______

Information Release Authorization, Webster Montessori School (Webster, NY)



WEBSTER MONTESSORI SCHOOL

AUTHORIZATION FOR RELEASE OF INFORMATION

Send to ______________________

____

____

Permission is hereby given to the Webster Montessori School to receive information from you regarding

Name ______________________

Address ______________________

____

Reason for request ______________________

Copy of records to be transferred include

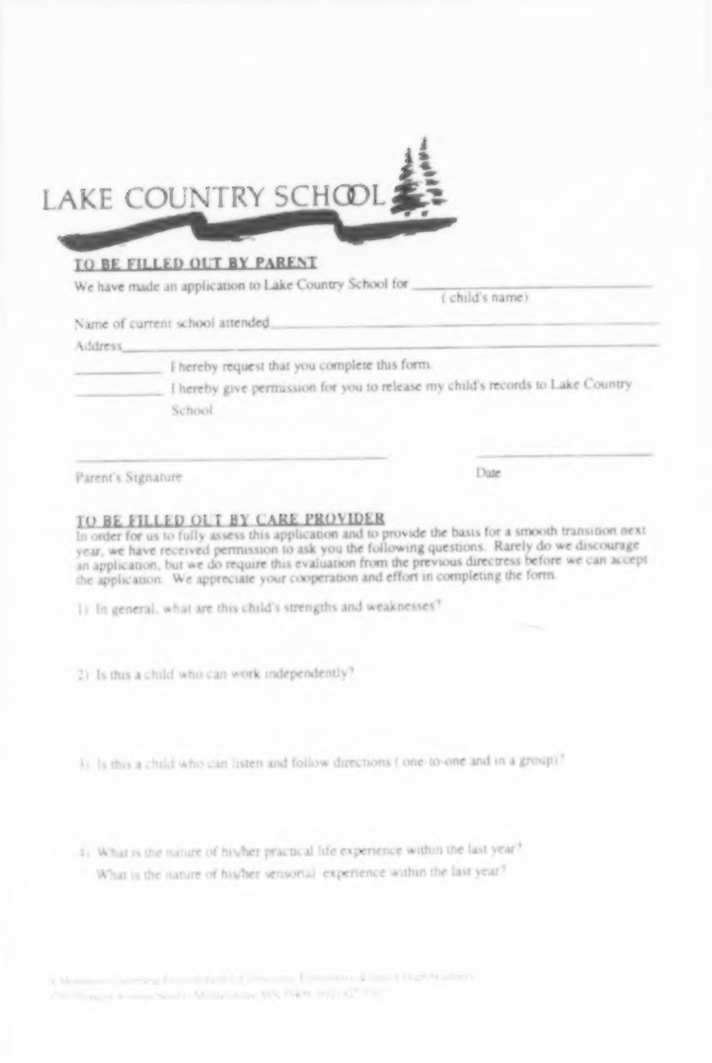
- ____ Official Administrative Records name, address, birthdate
- ____ Current Pupil Progress Report
- ____ Standardized Test Data (as available)
- ____ Health & Immunization Records
- ____ Psychological Reports (if they demonstrate continuing usefulness)

Parent/Guardian Signature ______________________

Date ______________________

Please forward information to Pamela Turan, Administrator
The Webster Montessori School
985 Ebner Drive
Webster, New York 14580

Authorization for release of information from a previous school, either Montessori or non-Montessori.



LAKE COUNTRY SCHOOL

TO BE FILLED OUT BY PARENT

We have made an application to Lake Country School for ______________________
(child's name)

Name of current school attended______________________________

Address______________________________

__________ I hereby request that you complete this form.

__________ I hereby give permission for you to release my child's records to Lake Country School.

______________________ Parent's Signature

______________ Date

TO BE FILLED OUT BY CARE PROVIDER

In order for us to fully assess this application and to provide the basis for a smooth transition next year, we have received permission to ask you the following questions. Rarely do we discourage an application, but we do require this evaluation from the previous directress before we can accept the application. We appreciate your cooperation and effort in completing the form.

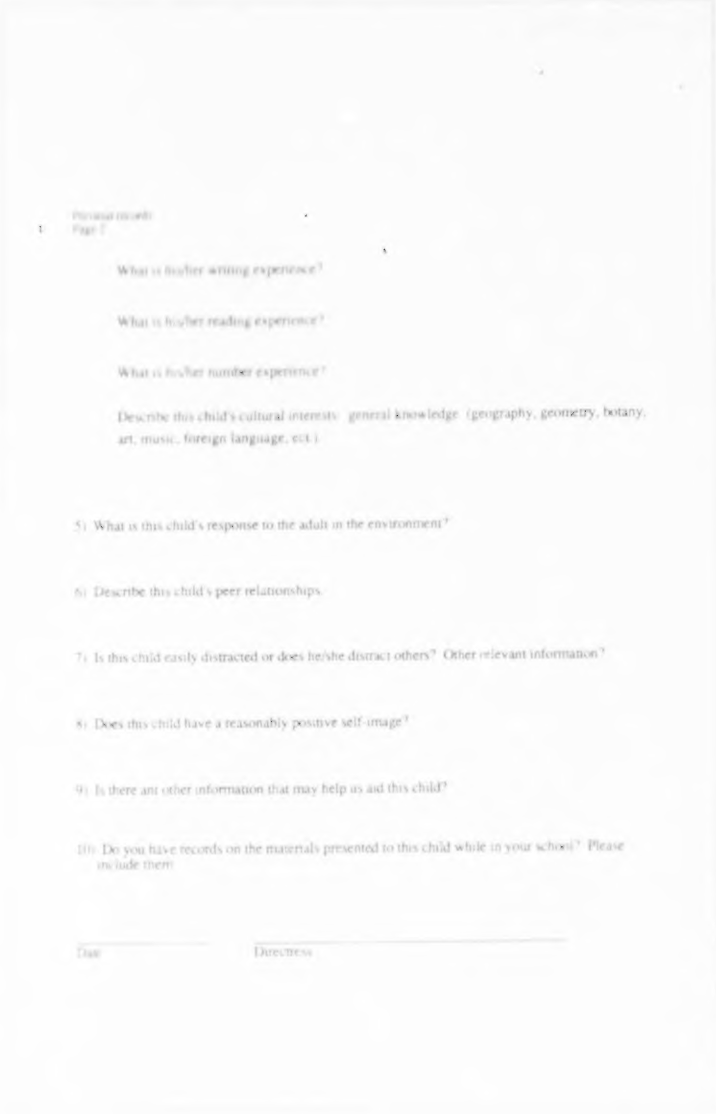
1) In general, what are this child's strengths and weaknesses?

2) Is this a child who can work independently?

3) Is this a child who can listen and follow directions (one-to-one and in a group)?

4) What is the nature of his/her practical life experience within the last year?
What is the nature of his/her sensorial experience within the last year?

Authorization for release of information tailored to a previously attended Montessori school



Personal records
Page 2

What is his/her writing experience?

What is his/her reading experience?

What is his/her number experience?

Describe this child's cultural interests: general knowledge (geography, geometry, botany, art, music, foreign language, ect.)

5) What is this child's response to the adult in the environment?

6) Describe this child's peer relationships.

7) Is this child easily distracted or does he/she distract others? Other relevant information?

8) Does this child have a reasonably positive self-image?

9) Is there ant other information that may help us aid this child?

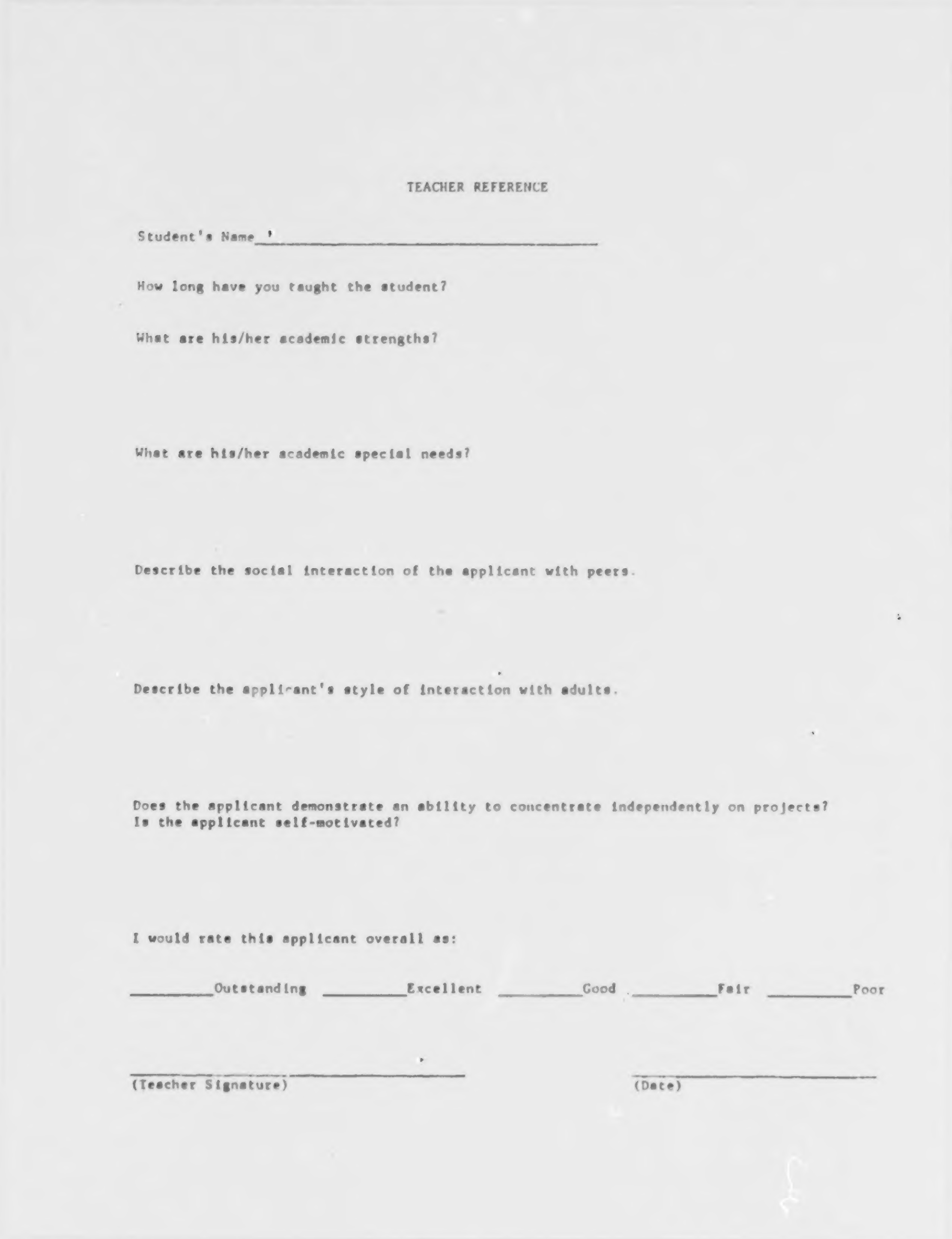
10) Do you have records on the materials presented to this child while in your school? Please include them.

______________ Date

______________________ Directress

Information Release Authorization, Lake Country School (Minneapolis, MN)

Teacher Reference Form



TEACHER REFERENCE

Student's Name________________________________

How long have you taught the student?

What are his/her academic strengths?

What are his/her academic special needs?

Describe the social interaction of the applicant with peers.

Describe the applicant's style of interaction with adults.

Does the applicant demonstrate an ability to concentrate independently on projects?
Is the applicant self-motivated?

I would rate this applicant overall as:

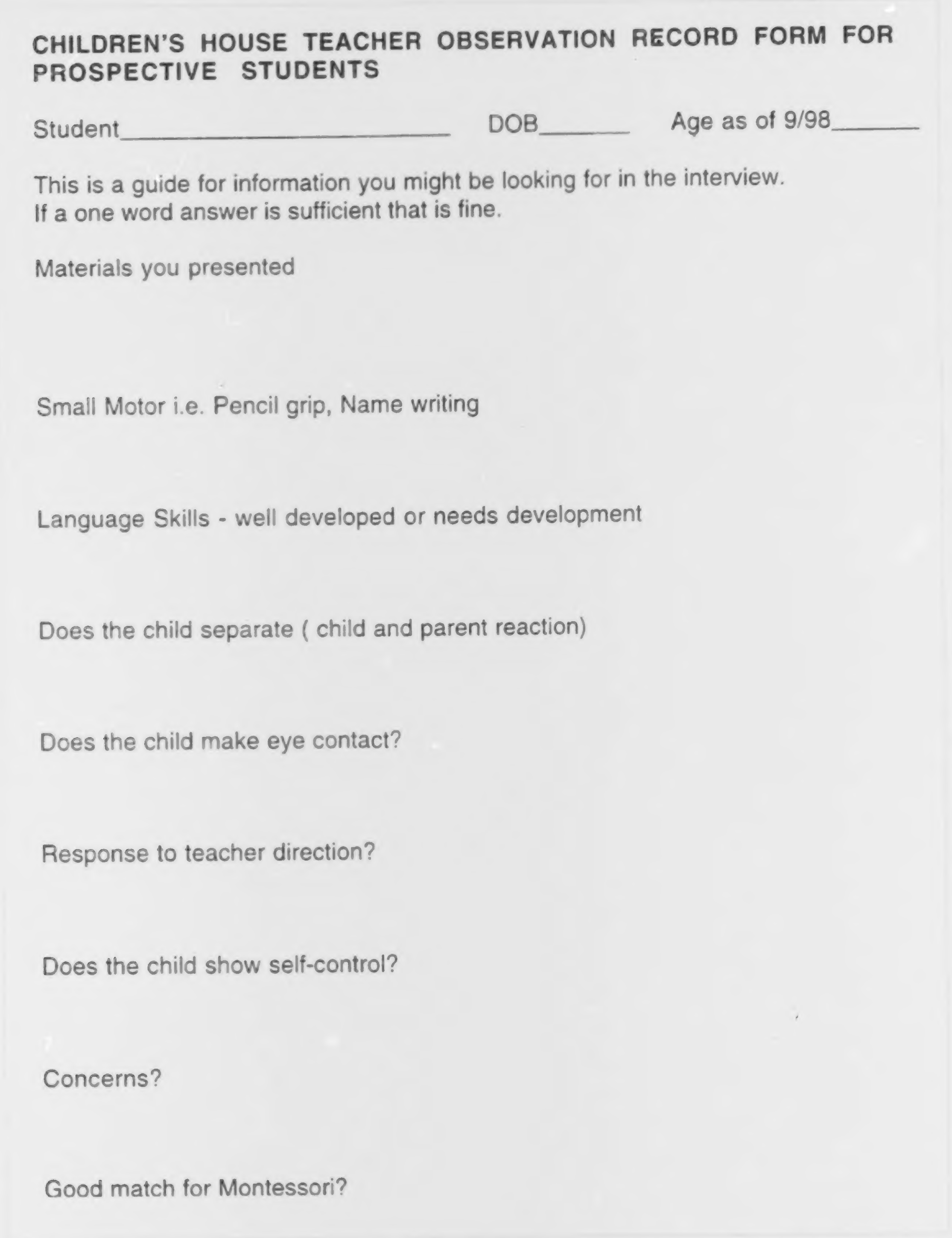
_________Outstanding _________Excellent _________Good _________Fair _________Poor

____
(Teacher Signature)

____
(Date)

Form to be filled out by a child's former teacher, for use with a separate release authorization form signed by the parent(s).

Young Child Interview Form, Lexington Montessori School (Lexington, MA)



CHILDREN'S HOUSE TEACHER OBSERVATION RECORD FORM FOR PROSPECTIVE STUDENTS

Student_____________________________ DOB_______ Age as of 9/98_______

This is a guide for information you might be looking for in the interview.
If a one word answer is sufficient that is fine.

Materials you presented

Small Motor i.e. Pencil grip, Name writing

Language Skills - well developed or needs development

Does the child separate (child and parent reaction)

Does the child make eye contact?

Response to teacher direction?

Does the child show self-control?

Concerns?

Good match for Montessori?

This Children's House teacher observation record is a clear observation summary for use in an interview with a young child.

Montessori-Experienced Elementary Child Interview Form

Elementary Interview Form

Name________________________ **Age**_________ **Interview Date**________________

1. Describe the writing level of the candidate (e.g. cursive or print, capitalization, reversals, pencil grip, etc.). Include a writing sample.

2. Describe the mathematics level of the candidate (e.g. linear counting, place value with the golden beads, exchanging, basic operations with materials, etc.):

3. Describe the reading skills of the candidate (phonetic or total reading, love of books, research ability, cultural awareness, etc.):

4. What is the sociability of the candidate?

5. What does the child say about his/her previous school?

6. What does the child do in his/her free time at home?

7. What is the child's general manner (e.g. careful with the materials, joyful, articulate, responsive, cooperative with parents, etc.):

8. Why have the parents chosen to bring their child to Montessori? What is their motivation?

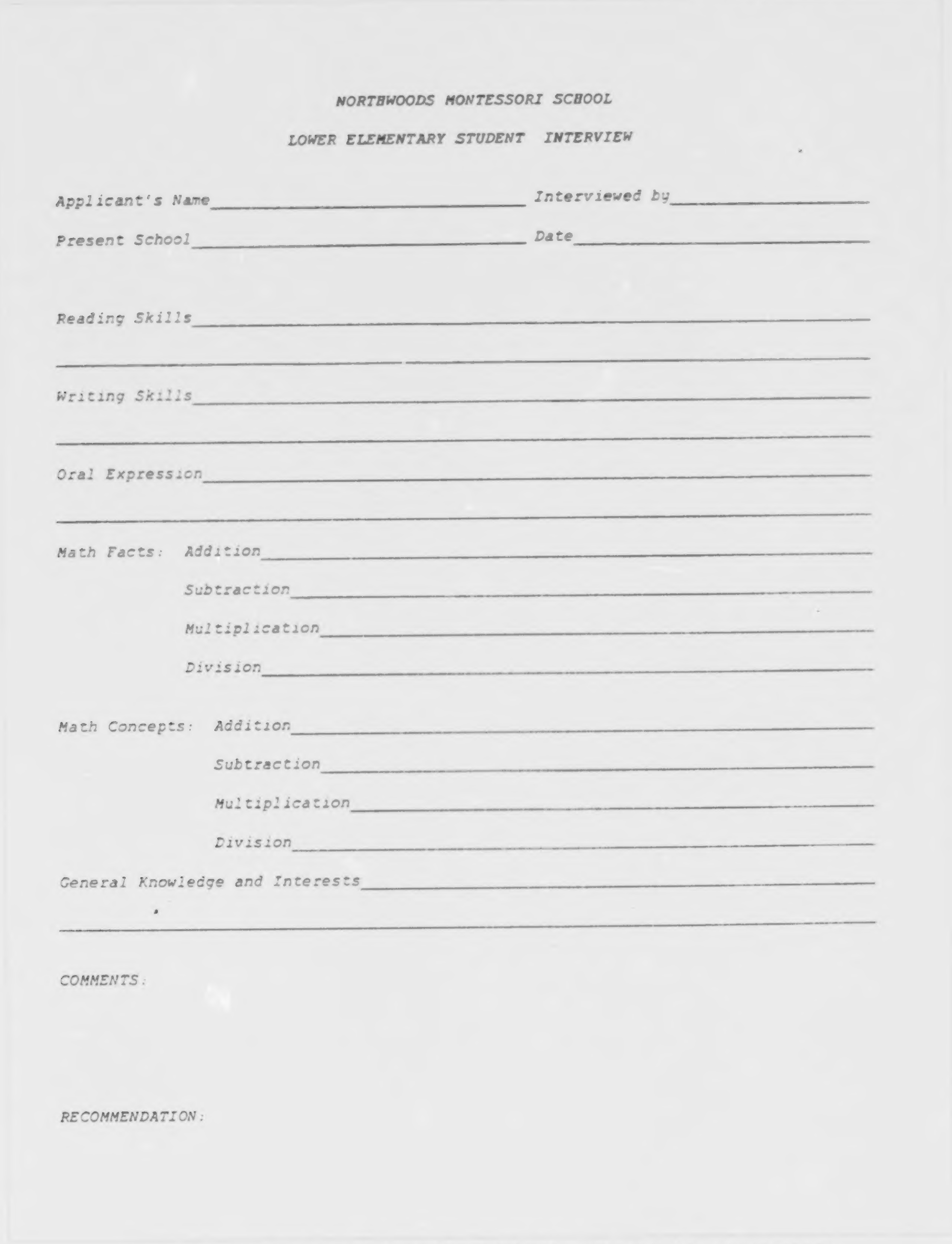
Remarks (Use other side if necessary):

Recommendation:

Signature of the Interviewer____________________________

The form for interviewing elementary children who have previously attended a Montessori school provides an informal assessment for academic purposes.

Non-Montessori Elementary Child Interview, Northwoods Montessori School (Atlanta, GA)



NORTHWOODS MONTESSORI SCHOOL

LOWER ELEMENTARY STUDENT INTERVIEW

Applicant's Name ______________________ Interviewed by ______________

Present School ______________________ Date ______________

Reading Skills ______________________________________

____

Writing Skills ______________________________________

____

Oral Expression ______________________________________

____

Math Facts: Addition ______________________________

Subtraction ______________________________

Multiplication ______________________________

Division ______________________________

Math Concepts: Addition ______________________________

Subtraction ______________________________

Multiplication ______________________________

Division ______________________________

General Knowledge and Interests ______________________________

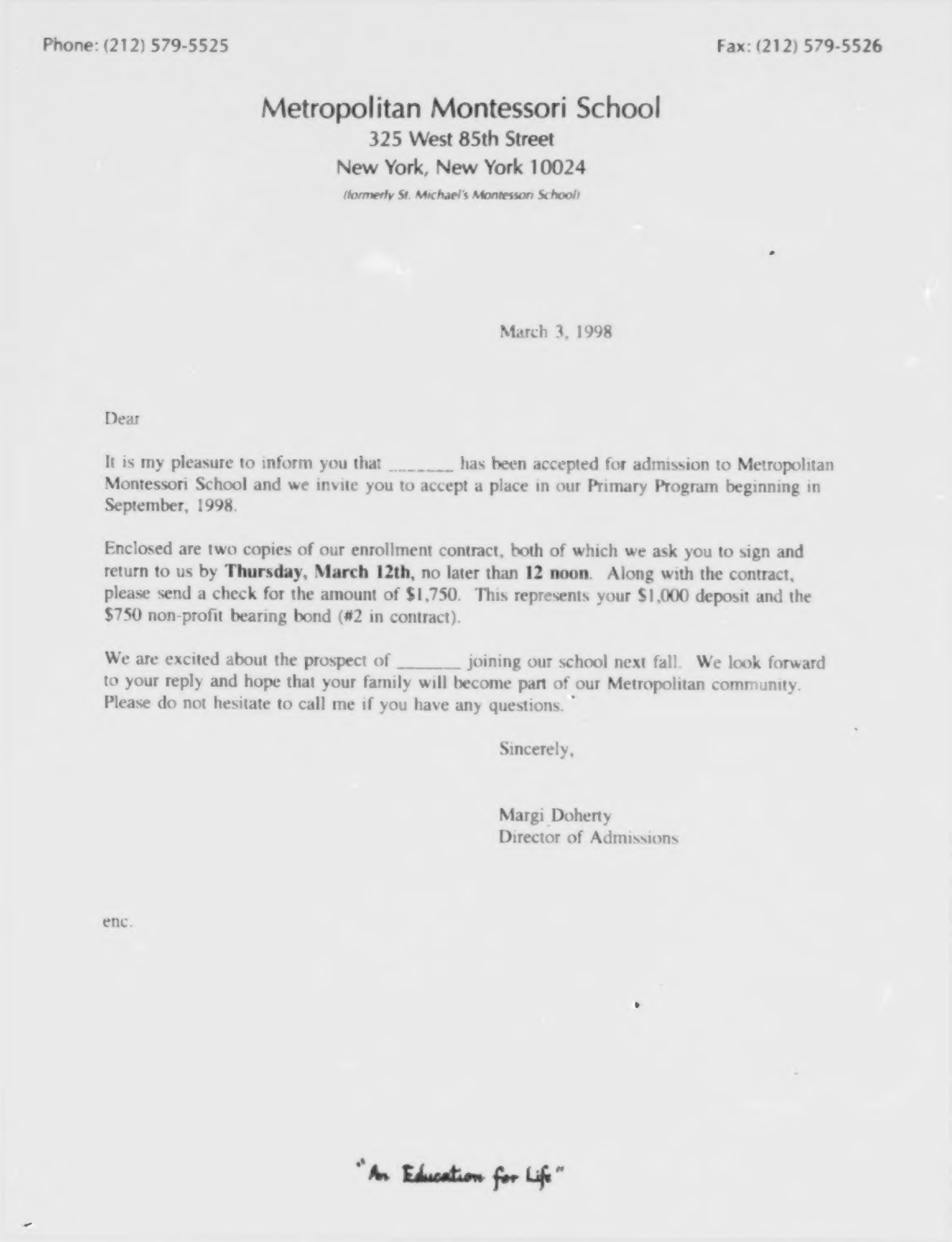
____

COMMENTS:

RECOMMENDATION:

An interview summary for an elementary applicant without Montessori experience.

Acceptance Letter, Metropolitan Montessori School (New York, NY)



Phone: (212) 579-5525
Fax: (212) 579-5526

Metropolitan Montessori School
325 West 85th Street
New York, New York 10024
(formerly St. Michael's Montessori School)

March 3, 1998

Dear

It is my pleasure to inform you that _______ has been accepted for admission to Metropolitan Montessori School and we invite you to accept a place in our Primary Program beginning in September, 1998.

Enclosed are two copies of our enrollment contract, both of which we ask you to sign and return to us by **Thursday, March 12th**, no later than **12 noon**. Along with the contract, please send a check for the amount of $1,750. This represents your $1,000 deposit and the $750 non-profit bearing bond (#2 in contract).

We are excited about the prospect of _______ joining our school next fall. We look forward to your reply and hope that your family will become part of our Metropolitan community. Please do not hesitate to call me if you have any questions.

Sincerely,

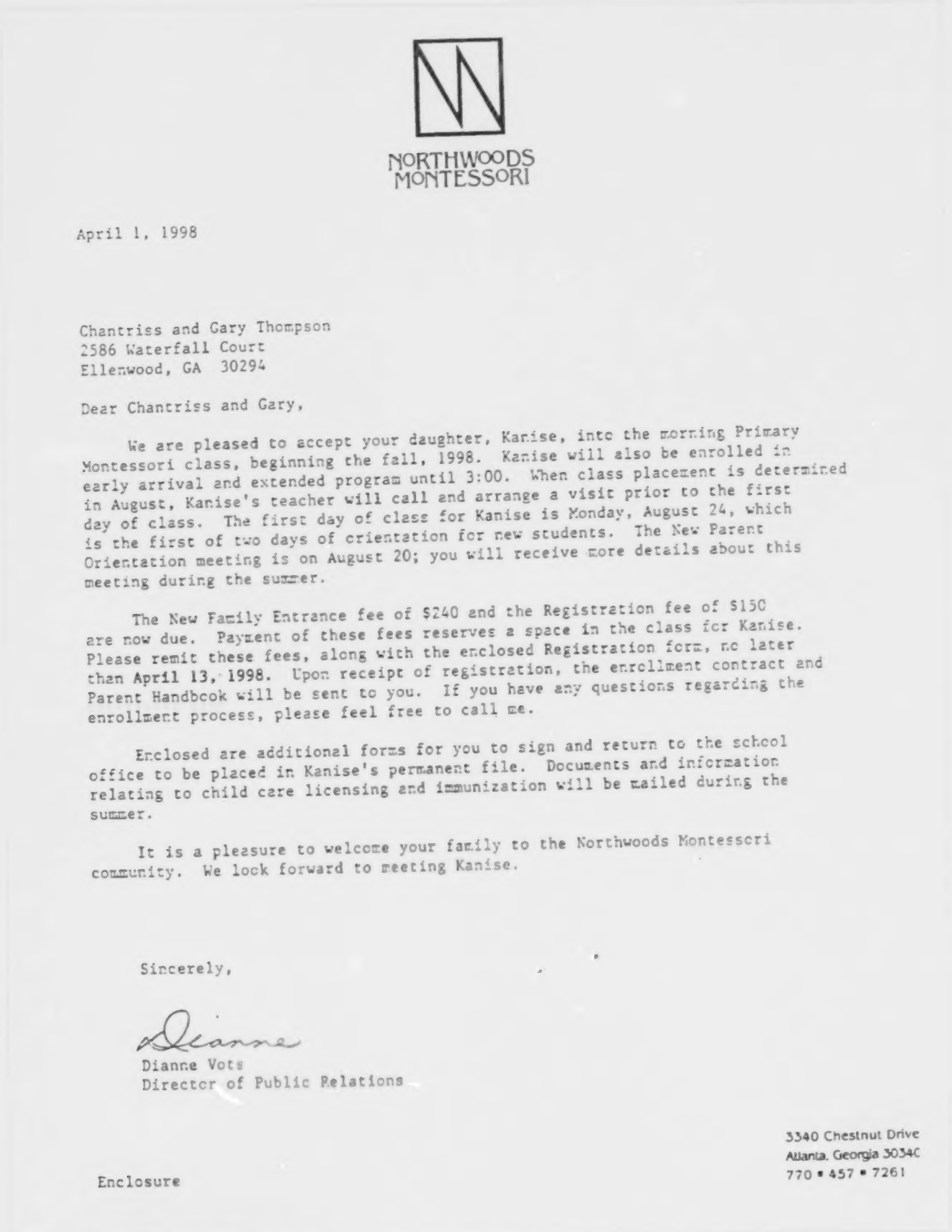
Margi Doherty
Director of Admissions

enc.

"An Education for Life"

This acceptance letter asks the parents to commit by returning an enrollment contract, tuition deposit, and new family bond fee.

Acceptance Letter, Northwoods Montessori School (Atlanta, GA)



NORTHWOODS
MONTESSORI

April 1, 1998

Chantriss and Gary Thompson
2586 Waterfall Court
Ellenwood, GA 30294

Dear Chantriss and Gary,

We are pleased to accept your daughter, Kanise, into the morning Primary Montessori class, beginning the fall, 1998. Kanise will also be enrolled in early arrival and extended program until 3:00. When class placement is determined in August, Kanise's teacher will call and arrange a visit prior to the first day of class. The first day of class for Kanise is Monday, August 24, which is the first of two days of orientation for new students. The New Parent Orientation meeting is on August 20; you will receive more details about this meeting during the summer.

The New Family Entrance fee of $240 and the Registration fee of $150 are now due. Payment of these fees reserves a space in the class for Kanise. Please remit these fees, along with the enclosed Registration form, no later than April 13, 1998. Upon receipt of registration, the enrollment contract and Parent Handbook will be sent to you. If you have any questions regarding the enrollment process, please feel free to call me.

Enclosed are additional forms for you to sign and return to the school office to be placed in Kanise's permanent file. Documents and information relating to child care licensing and immunization will be mailed during the summer.

It is a pleasure to welcome your family to the Northwoods Montessori community. We look forward to meeting Kanise.

Sincerely,

Dianne

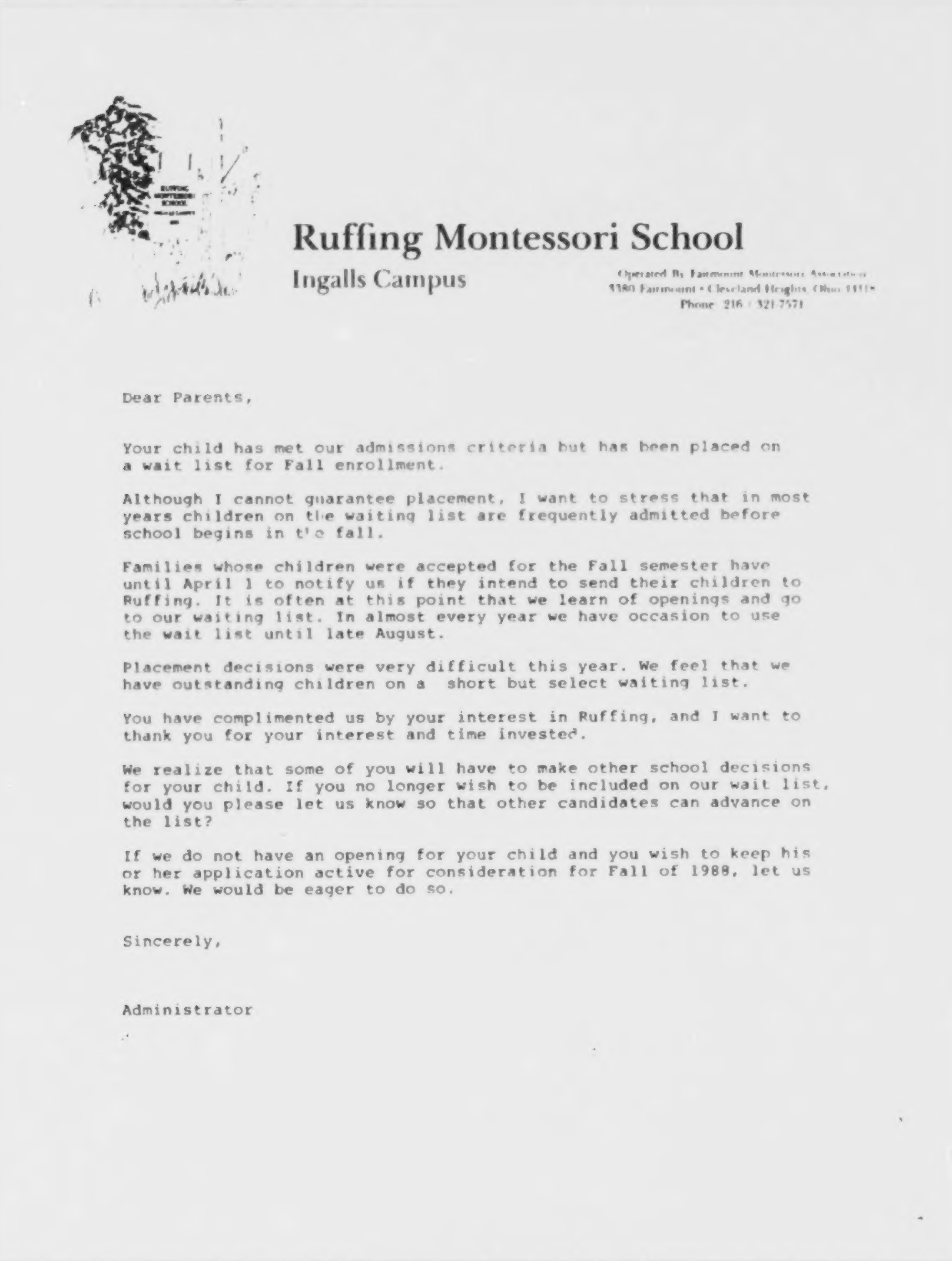
Dianne Vots
Director of Public Relations

3340 Chestnut Drive
Atlanta, Georgia 30340
770 • 457 • 7261

Enclosure

This acceptance letter clearly communicates both the parents' obligations and the remaining procedures prior to the start of school.

Wait List Letter, Ruffing Montessori School East (Cleveland Heights, OH)



Ruffing Montessori School
Ingalls Campus

Operated By Fairmount Montessori Association
3380 Fairmount • Cleveland Heights, Ohio 44118
Phone 216 / 321-7571

Dear Parents,

Your child has met our admissions criteria but has been placed on a wait list for Fall enrollment.

Although I cannot guarantee placement, I want to stress that in most years children on the waiting list are frequently admitted before school begins in the fall.

Families whose children were accepted for the Fall semester have until April 1 to notify us if they intend to send their children to Ruffing. It is often at this point that we learn of openings and go to our waiting list. In almost every year we have occasion to use the wait list until late August.

Placement decisions were very difficult this year. We feel that we have outstanding children on a short but select waiting list.

You have complimented us by your interest in Ruffing, and I want to thank you for your interest and time invested.

We realize that some of you will have to make other school decisions for your child. If you no longer wish to be included on our wait list, would you please let us know so that other candidates can advance on the list?

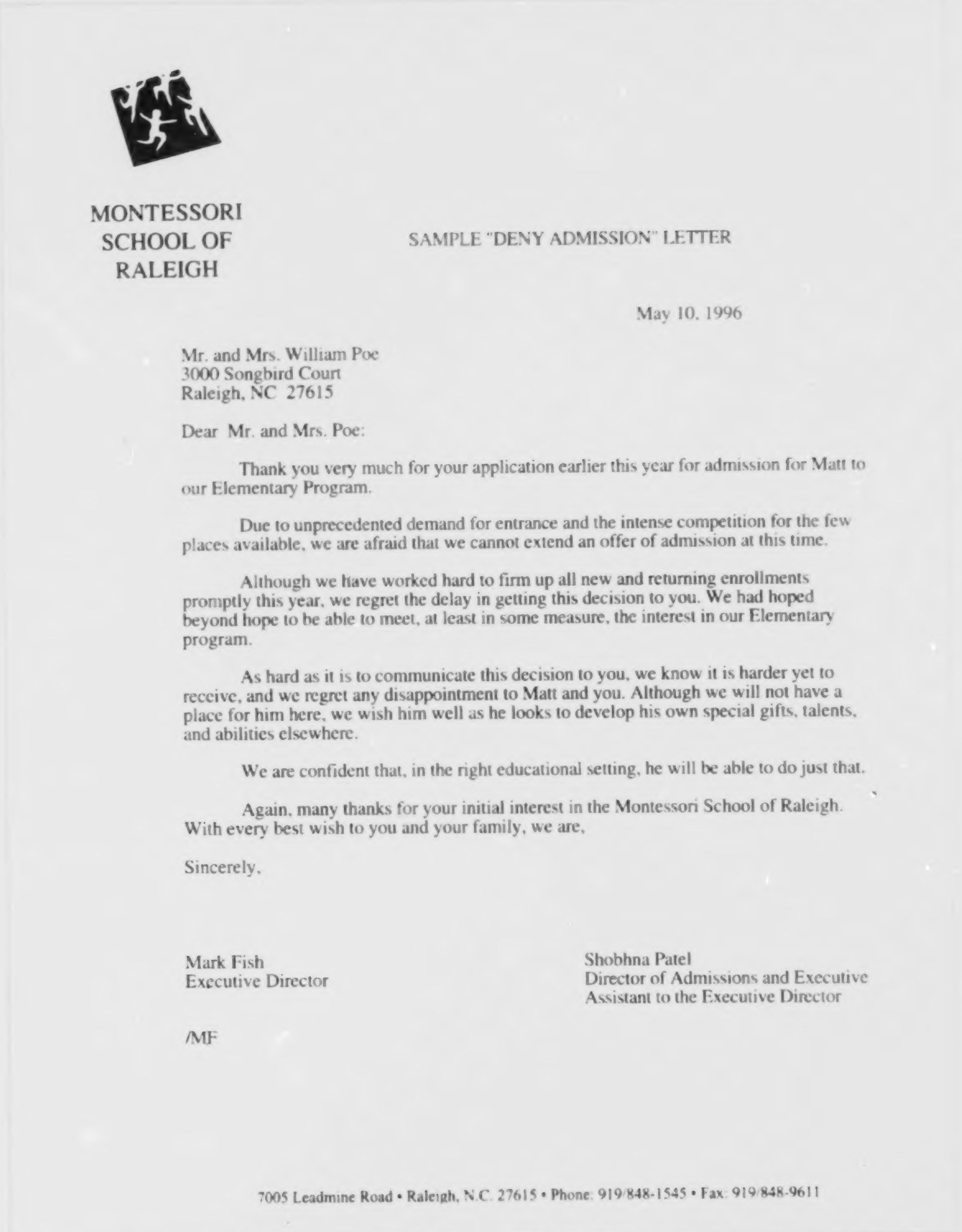
If we do not have an opening for your child and you wish to keep his or her application active for consideration for Fall of 1988, let us know. We would be eager to do so.

Sincerely,

Administrator

This letter informs parents of their child's placement on the wait list. Regular follow-up by the school ensures that parents remain apprised of the likelihood of admission.

Deny-Admission Letter, Montessori School of Raleigh (Raleigh, NC)



MONTESSORI
SCHOOL OF
RALEIGH

SAMPLE "DENY ADMISSION" LETTER

May 10, 1996

Mr. and Mrs. William Poe
3000 Songbird Court
Raleigh, NC 27615

Dear Mr. and Mrs. Poe:

Thank you very much for your application earlier this year for admission for Matt to our Elementary Program.

Due to unprecedented demand for entrance and the intense competition for the few places available, we are afraid that we cannot extend an offer of admission at this time.

Although we have worked hard to firm up all new and returning enrollments promptly this year, we regret the delay in getting this decision to you. We had hoped beyond hope to be able to meet, at least in some measure, the interest in our Elementary program.

As hard as it is to communicate this decision to you, we know it is harder yet to receive, and we regret any disappointment to Matt and you. Although we will not have a place for him here, we wish him well as he looks to develop his own special gifts, talents, and abilities elsewhere.

We are confident that, in the right educational setting, he will be able to do just that.

Again, many thanks for your initial interest in the Montessori School of Raleigh. With every best wish to you and your family, we are,

Sincerely,

Mark Fish
Executive Director

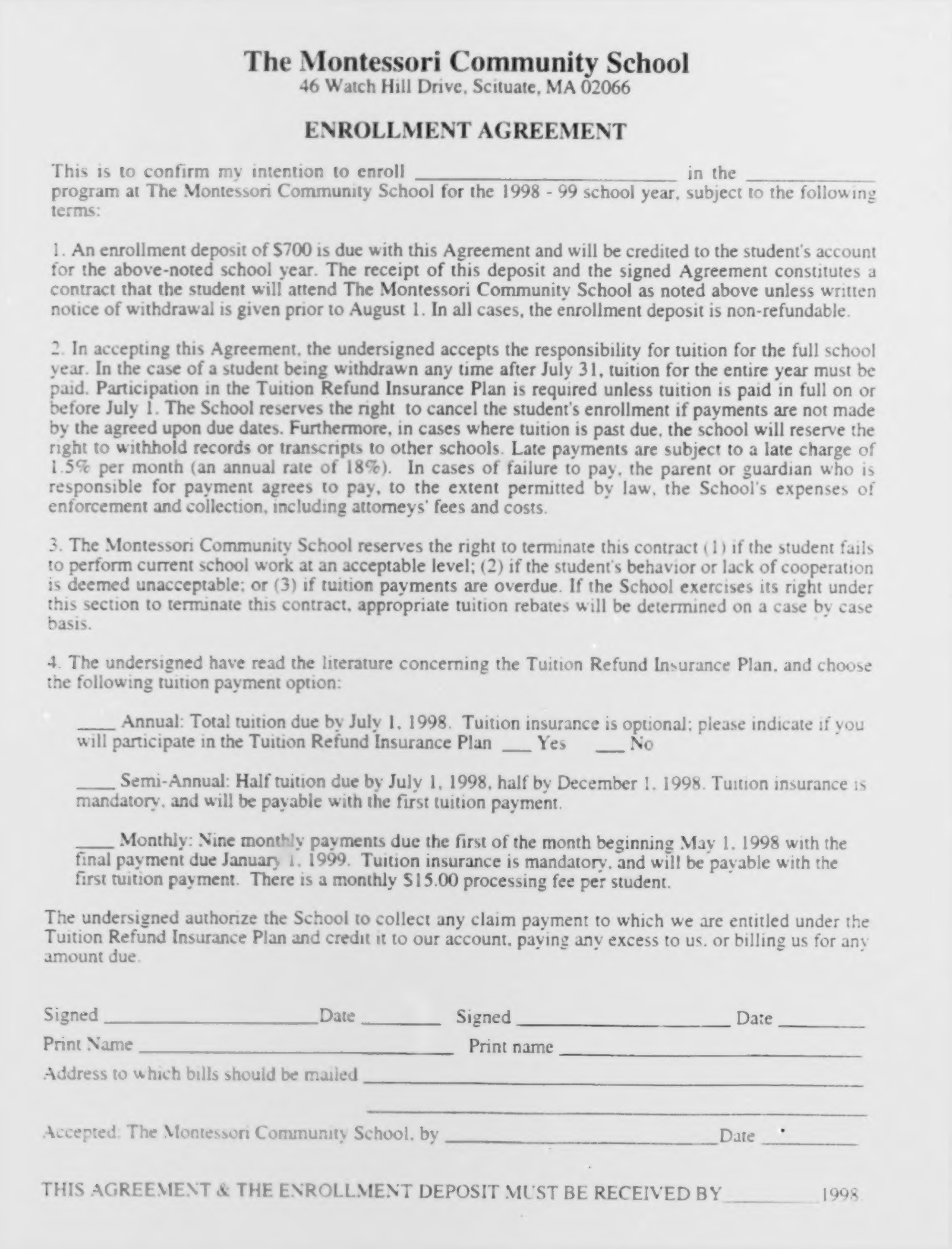
Shobhna Patel
Director of Admissions and Executive
Assistant to the Executive Director

/MF

7005 Leadmine Road • Raleigh, N.C. 27615 • Phone: 919/848-1545 • Fax: 919/848-9611

- Recognizing how difficult it is to deny admission without engendering feelings of rejection and hurt, this humane example acknowledges disappointment while communicating genuine regard for the child and family.

Enrollment Contract, The Montessori Community School (Scituate, MA)



The Montessori Community School
46 Watch Hill Drive, Scituate, MA 02066

ENROLLMENT AGREEMENT

This is to confirm my intention to enroll ________________________ in the __________ program at The Montessori Community School for the 1998 - 99 school year, subject to the following terms:

1. An enrollment deposit of $700 is due with this Agreement and will be credited to the student's account for the above-noted school year. The receipt of this deposit and the signed Agreement constitutes a contract that the student will attend The Montessori Community School as noted above unless written notice of withdrawal is given prior to August 1. In all cases, the enrollment deposit is non-refundable.

2. In accepting this Agreement, the undersigned accepts the responsibility for tuition for the full school year. In the case of a student being withdrawn any time after July 31, tuition for the entire year must be paid. Participation in the Tuition Refund Insurance Plan is required unless tuition is paid in full on or before July 1. The School reserves the right to cancel the student's enrollment if payments are not made by the agreed upon due dates. Furthermore, in cases where tuition is past due, the school will reserve the right to withhold records or transcripts to other schools. Late payments are subject to a late charge of 1.5% per month (an annual rate of 18%). In cases of failure to pay, the parent or guardian who is responsible for payment agrees to pay, to the extent permitted by law, the School's expenses of enforcement and collection, including attorneys' fees and costs.

3. The Montessori Community School reserves the right to terminate this contract (1) if the student fails to perform current school work at an acceptable level; (2) if the student's behavior or lack of cooperation is deemed unacceptable; or (3) if tuition payments are overdue. If the School exercises its right under this section to terminate this contract, appropriate tuition rebates will be determined on a case by case basis.

4. The undersigned have read the literature concerning the Tuition Refund Insurance Plan, and choose the following tuition payment option:

____ Annual: Total tuition due by July 1, 1998. Tuition insurance is optional; please indicate if you will participate in the Tuition Refund Insurance Plan ___ Yes ___ No

____ Semi-Annual: Half tuition due by July 1, 1998, half by December 1, 1998. Tuition insurance is mandatory, and will be payable with the first tuition payment.

____ Monthly: Nine monthly payments due the first of the month beginning May 1, 1998 with the final payment due January 1, 1999. Tuition insurance is mandatory, and will be payable with the first tuition payment. There is a monthly $15.00 processing fee per student.

The undersigned authorize the School to collect any claim payment to which we are entitled under the Tuition Refund Insurance Plan and credit it to our account, paying any excess to us, or billing us for any amount due.

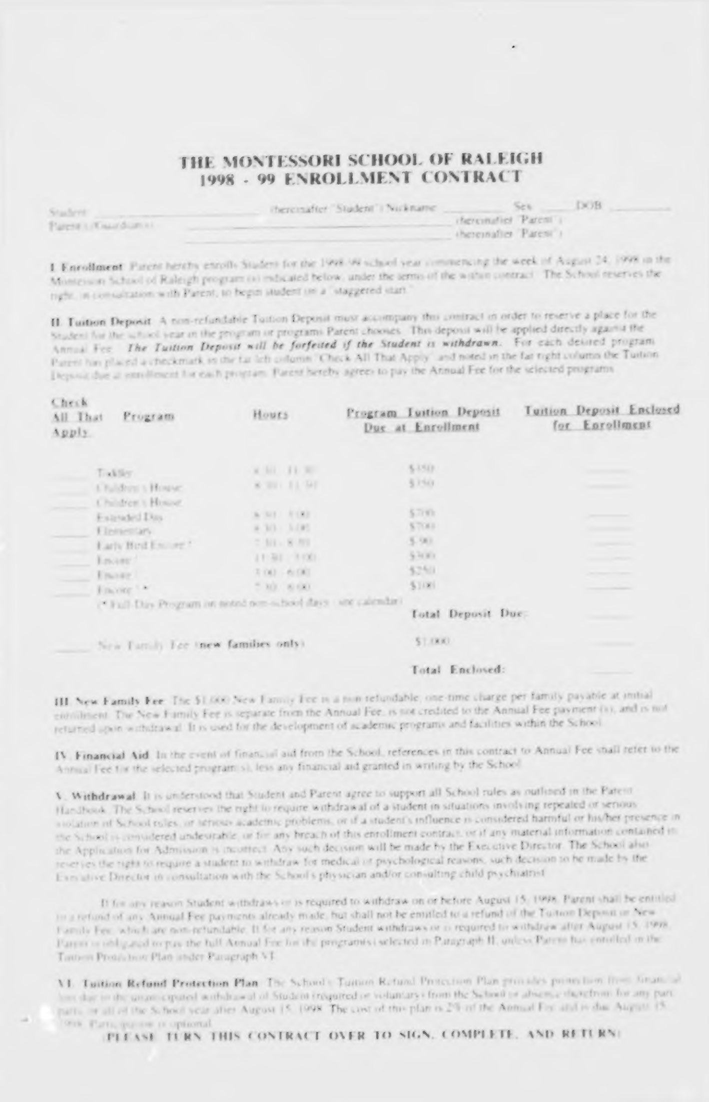
Signed __________________ Date _______ Signed __________________ Date _______
Print Name ________________________ Print name ________________________
Address to which bills should be mailed ________________________________
____
Accepted: The Montessori Community School, by ________________________ Date _______

THIS AGREEMENT & THE ENROLLMENT DEPOSIT MUST BE RECEIVED BY ________ 1998

This enrollment contract requires that parents take out tuition refund insurance if they do not agree to pay the entire tuition before the start of the school year (for more information on tuition insurance, see Chapter 3).

Enrollment Contract, Montessori School of Raleigh (Raleigh, NC)

This enrollment contract includes ancillary programs. For more examples of enrollment agreements and contracts, see Chapter 3.



THE MONTESSORI SCHOOL OF RALEIGH
1998 - 99 ENROLLMENT CONTRACT

Student ______________ (hereinafter "Student") Nickname ________ Sex _____ DOB ________
Parent(s)/Guardian(s) ______________ (hereinafter "Parent")
______________ (hereinafter "Parent")

I. Enrollment. Parent hereby enrolls Student for the 1998-99 school year commencing the week of August 24, 1998 in the Montessori School of Raleigh program(s) indicated below, under the terms of the within contract. The School reserves the right, in consultation with Parent, to begin student on a "staggered start."

II. Tuition Deposit. A non-refundable Tuition Deposit must accompany this contract in order to reserve a place for the Student for the school year in the program or programs Parent chooses. This deposit will be applied directly against the Annual Fee. ***The Tuition Deposit will be forfeited if the Student is withdrawn.*** For each desired program Parent has placed a checkmark in the far left column "Check All That Apply" and noted in the far right column the Tuition Deposit due at enrollment for each program. Parent hereby agrees to pay the Annual Fee for the selected programs.

Check All That Apply	**Program**	**Hours**	**Program Tuition Deposit Due at Enrollment**	**Tuition Deposit Enclosed for Enrollment**
______	Toddler	8:30 - 11:30	$350	______
______	Children's House	8:30 - 11:30	$350	______
______	Children's House Extended Day	8:30 - 3:00	$700	______
______	Elementary	8:30 - 3:00	$700	______
______	Early Bird Encore !	7:30 - 8:30	$ 90	______
______	Encore !	11:30 - 3:00	$300	______
______	Encore !	3:00 - 6:00	$250	______
______	Encore ! *	7:30 - 6:00	$100	______
	(* Full-Day Program on noted non-school days - see calendar)			
			Total Deposit Due:	______
______	New Family Fee (**new families only**)		$1,000	______
			Total Enclosed:	______

III. New Family Fee. The $1,000 New Family Fee is a non-refundable, one-time charge per family payable at initial enrollment. The New Family Fee is separate from the Annual Fee, is not credited to the Annual Fee payment (s), and is not returned upon withdrawal. It is used for the development of academic programs and facilities within the School.

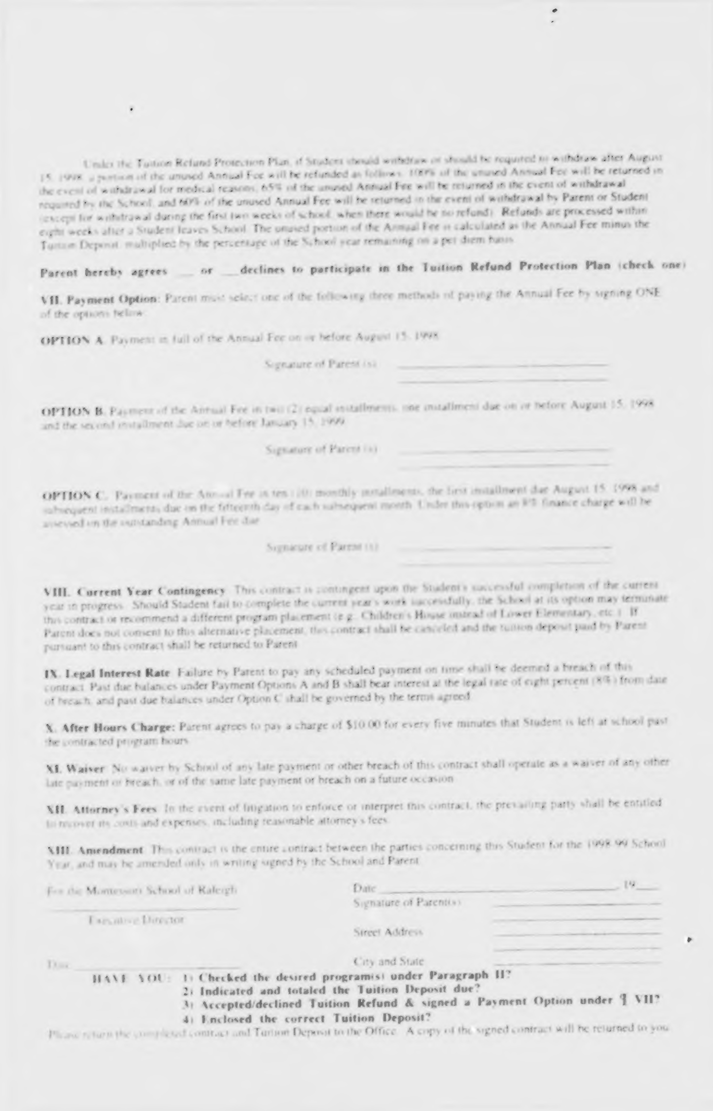
IV. Financial Aid. In the event of financial aid from the School, references in this contract to Annual Fee shall refer to the Annual Fee for the selected program(s), less any financial aid granted in writing by the School.

V. Withdrawal. It is understood that Student and Parent agree to support all School rules as outlined in the Parent Handbook. The School reserves the right to require withdrawal of a student in situations involving repeated or serious violation of School rules, or serious academic problems, or if a student's influence is considered harmful or his/her presence in the School is considered undesirable, or for any breach of this enrollment contract, or if any material information contained in the Application for Admission is incorrect. Any such decision will be made by the Executive Director. The School also reserves the right to require a student to withdraw for medical or psychological reasons, such decision to be made by the Executive Director in consultation with the School's physician and/or consulting child psychiatrist.

If for any reason Student withdraws or is required to withdraw on or before August 15, 1998, Parent shall be entitled to a refund of any Annual Fee payments already made, but shall not be entitled to a refund of the Tuition Deposit or New Family Fee, which are non-refundable. If for any reason Student withdraws or is required to withdraw after August 15, 1998, Parent is obligated to pay the full Annual Fee for the program(s) selected in Paragraph II, unless Parent has enrolled in the Tuition Protection Plan under Paragraph VI.

VI. Tuition Refund Protection Plan. The School's Tuition Refund Protection Plan provides protection from financial loss due to the unanticipated withdrawal of Student (required or voluntary) from the School or absence therefrom for any part, parts, or all of the School year after August 15, 1998. The cost of this plan is 2% of the Annual Fee and is due August 15, 1998. Participation is optional.

(PLEASE TURN THIS CONTRACT OVER TO SIGN, COMPLETE, AND RETURN)



Under the Tuition Refund Protection Plan, if Student should withdraw or should be required to withdraw after August 15, 1998, a portion of the unused Annual Fee will be refunded as follows: 100% of the unused Annual Fee will be returned in the event of withdrawal for medical reasons, 65% of the unused Annual Fee will be returned in the event of withdrawal required by the School, and 60% of the unused Annual Fee will be returned in the event of withdrawal by Parent or Student (except for withdrawal during the first two weeks of school, when there would be no refund). Refunds are processed within eight weeks after a Student leaves School. The unused portion of the Annual Fee is calculated as the Annual Fee minus the Tuition Deposit, multiplied by the percentage of the School year remaining on a per diem basis.

Parent hereby agrees ___ or ___declines to participate in the Tuition Refund Protection Plan (check one)

VII. Payment Option: Parent must select one of the following three methods of paying the Annual Fee by signing ONE of the options below.

OPTION A. Payment in full of the Annual Fee on or before August 15, 1998.

Signature of Parent (s) ______________
____

OPTION B. Payment of the Annual Fee in two (2) equal installments, one installment due on or before August 15, 1998 and the second installment due on or before January 15, 1999.

Signature of Parent (s) ______________
____

OPTION C. Payment of the Annual Fee in ten (10) monthly installments, the first installment due August 15, 1998 and subsequent installments due on the fifteenth day of each subsequent month. Under this option an 8% finance charge will be assessed on the outstanding Annual Fee due.

Signature of Parent (s) ______________
____

VIII. Current Year Contingency. This contract is contingent upon the Student's successful completion of the current year in progress. Should Student fail to complete the current year's work successfully, the School at its option may terminate this contract or recommend a different program placement (e.g., Children's House instead of Lower Elementary, etc.). If Parent does not consent to this alternative placement, this contract shall be canceled and the tuition deposit paid by Parent pursuant to this contract shall be returned to Parent.

IX. Legal Interest Rate. Failure by Parent to pay any scheduled payment on time shall be deemed a breach of this contract. Past due balances under Payment Options A and B shall bear interest at the legal rate of eight percent (8%) from date of breach, and past due balances under Option C shall be governed by the terms agreed.

X. After Hours Charge: Parent agrees to pay a charge of $10.00 for every five minutes that Student is left at school past the contracted program hours.

XI. Waiver. No waiver by School of any late payment or other breach of this contract shall operate as a waiver of any other late payment or breach, or of the same late payment or breach on a future occasion.

XII. Attorney's Fees. In the event of litigation to enforce or interpret this contract, the prevailing party shall be entitled to recover its costs and expenses, including reasonable attorney's fees.

XIII. Amendment. This contract is the entire contract between the parties concerning this Student for the 1998-99 School Year, and may be amended only in writing signed by the School and Parent.

For the Montessori School of Raleigh
____
Executive Director

Date ______________

Date ______________, 19___
Signature of Parent(s) ______________
____
Street Address ______________
____
City and State ______________

HAVE YOU:
1) Checked the desired program(s) under Paragraph II?
2) Indicated and totaled the Tuition Deposit due?
3) Accepted/declined Tuition Refund & signed a Payment Option under ¶ VII?
4) Enclosed the correct Tuition Deposit?

Please return the completed contract and Tuition Deposit to the Office. A copy of the signed contract will be returned to you.

Not-Returning Form and Enrollment Schedule, Rock Prairie Montessori School (Janesville, WI)

Rock Prairie uses a form to solicit information and comments from families who decide not to re-enroll as well as an outline to inform new and returning parents of expectations and deadlines in the enrollment process

ROCK · PRAIRIE
montessori

OUTLINE FOR ENROLLMENT MATERIALS

DUE DATE	MATERIALS
Returning families April 30, 1998	***Deposit**- see Tuition Schedule for amount based on payment plan chosen -non-refundable *Application Procedure Form *Enrollment and Tuition **Contract** *Before/After School Registration Form *Scholarship applications due to PSAS as soon as possible
New Families Within two weeks	***Registration Fee-$150 (payable once per family, non-refundable)** *Deposit- see Tuition Schedule for amount based on payment plan chosen -non-refundable *Application/Application Procedure Form *Enrollment and Tuition Contract *Child Care Enrollment Form *Before/After School Registration Form *Parent Profile(s) *Blue Card File Record *Day Care Immunization Record
All Families September 8-11, 1998	*Current Child Health Report *Tuition Single payment ($1427 CH /$3149 Elem) 1st of two payments ($721 CH / $1590 Elem) September payment- see Tuition Schedule for amount based on payment plan chosen

Rock Prairie Montessori admits students of any race, color, national or ethnic origin to all the rights, privileges, programs, and activities generally accorded or made available to students at the school. It does not discriminate on the basis of race, color, sex, national and ethnic origin in administration of its educational policies, admissions policies, scholarship and loan programs, and athletic and other school administered programs.

Rock Prairie Montessori 5246 E. Rotamer Rd. Janesville, WI 53546 608-868-4844

ROCK · PRAIRIE
montessori

Not Returning

If your child is not returning to Rock Prairie, we need to know. Please take a few minutes to complete this short form and return it to us by the re-enrollment deadline, April 30, 1998.

Names of students who will NOT return for the 1998-99 school year:

____

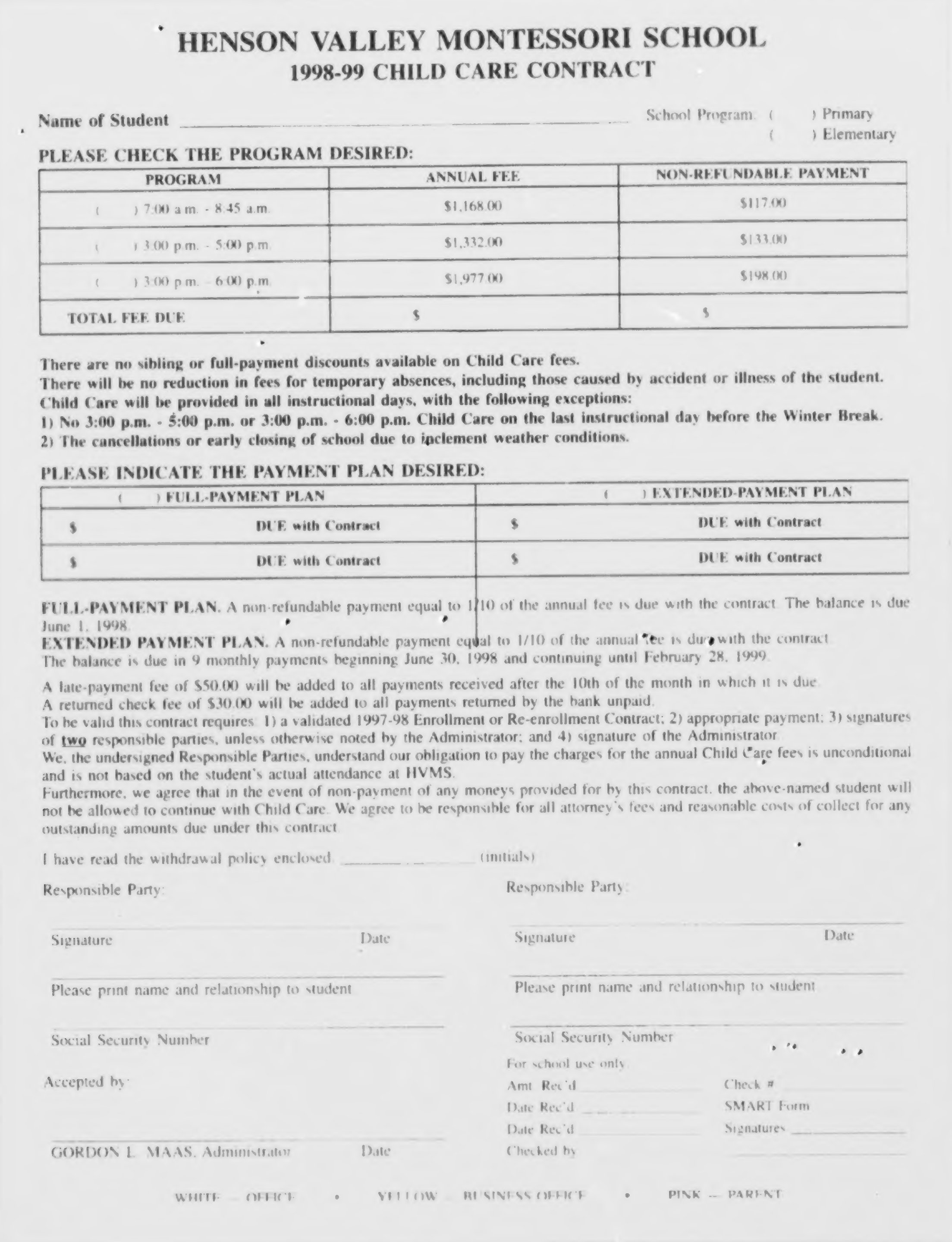
____

Will transfer to:______________________________

Please make any comments regarding your child's experience at Rock Prairie:

____
(Parent's signature)

Child Care Contract, Henson Valley Montessori School (Temple Hills, MD)



HENSON VALLEY MONTESSORI SCHOOL

1998-99 CHILD CARE CONTRACT

Name of Student ______________________________ School Program: (   ) Primary
(   ) Elementary

PLEASE CHECK THE PROGRAM DESIRED:

PROGRAM	ANNUAL FEE	NON-REFUNDABLE PAYMENT
( ) 7:00 a.m. - 8:45 a.m.	$1,168.00	$117.00
( ) 3:00 p.m. - 5:00 p.m.	$1,332.00	$133.00
( ) 3:00 p.m. - 6:00 p.m.	$1,977.00	$198.00
TOTAL FEE DUE	$	$

There are no sibling or full-payment discounts available on Child Care fees.
There will be no reduction in fees for temporary absences, including those caused by accident or illness of the student.
Child Care will be provided in all instructional days, with the following exceptions:
1) No 3:00 p.m. - 5:00 p.m. or 3:00 p.m. - 6:00 p.m. Child Care on the last instructional day before the Winter Break.
2) The cancellations or early closing of school due to inclement weather conditions.

PLEASE INDICATE THE PAYMENT PLAN DESIRED:

( ) FULL-PAYMENT PLAN		( ) EXTENDED-PAYMENT PLAN	
$	DUE with Contract	$	DUE with Contract
$	DUE with Contract	$	DUE with Contract

FULL-PAYMENT PLAN. A non-refundable payment equal to 1/10 of the annual fee is due with the contract. The balance is due June 1, 1998.
EXTENDED PAYMENT PLAN. A non-refundable payment equal to 1/10 of the annual fee is due with the contract. The balance is due in 9 monthly payments beginning June 30, 1998 and continuing until February 28, 1999.

A late-payment fee of $50.00 will be added to all payments received after the 10th of the month in which it is due.
A returned check fee of $30.00 will be added to all payments returned by the bank unpaid.
To be valid this contract requires: 1) a validated 1997-98 Enrollment or Re-enrollment Contract; 2) appropriate payment; 3) signatures of **two** responsible parties, unless otherwise noted by the Administrator; and 4) signature of the Administrator.
We, the undersigned Responsible Parties, understand our obligation to pay the charges for the annual Child Care fees is unconditional and is not based on the student's actual attendance at HVMS.
Furthermore, we agree that in the event of non-payment of any moneys provided for by this contract, the above-named student will not be allowed to continue with Child Care. We agree to be responsible for all attorney's fees and reasonable costs of collect for any outstanding amounts due under this contract.

I have read the withdrawal policy enclosed. ______________ (initials)

Responsible Party:		Responsible Party:	
Signature	Date	Signature	Date
Please print name and relationship to student		Please print name and relationship to student	
Social Security Number		Social Security Number	

For school use only

Accepted by:

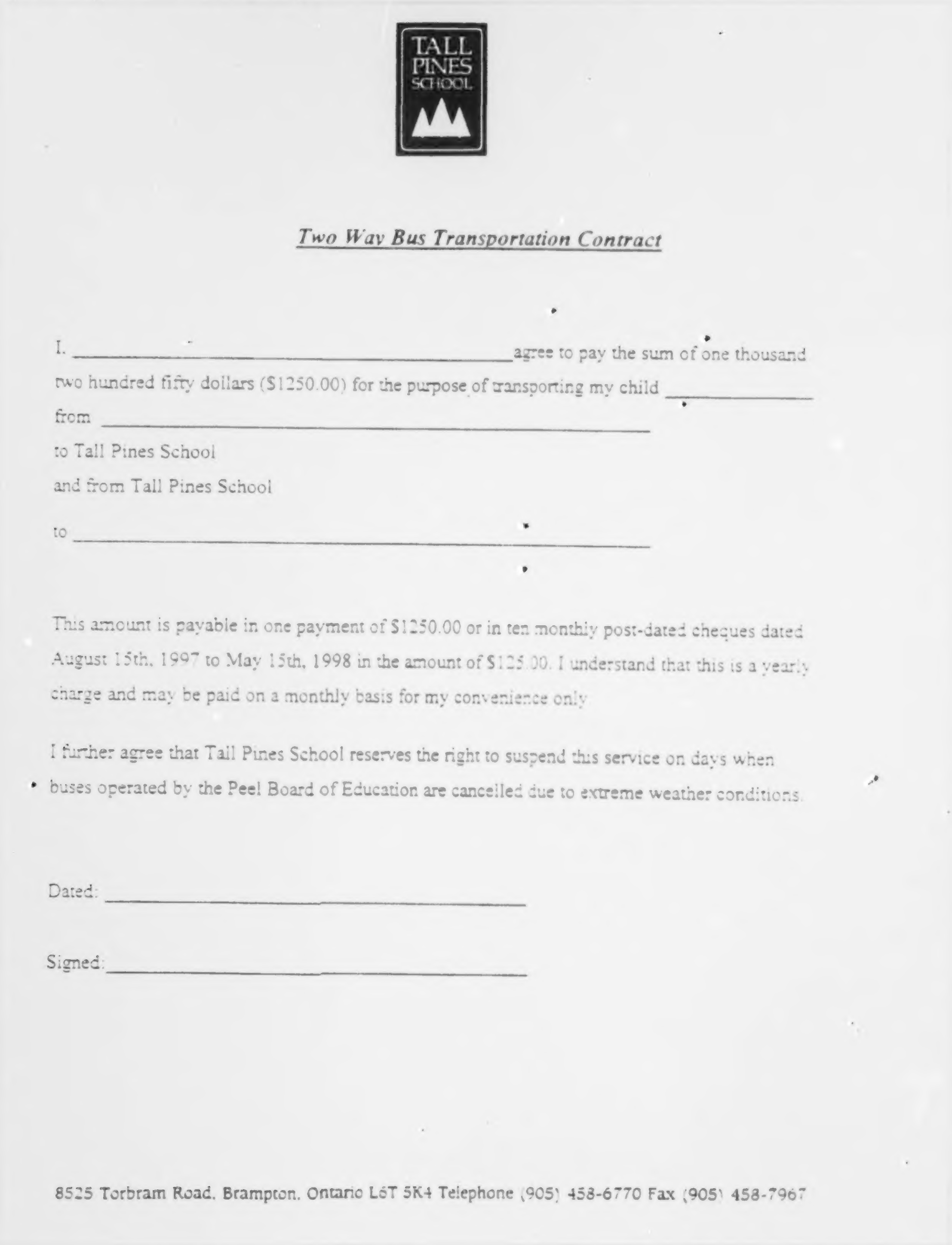
GORDON L. MAAS, Administrator   Date

Amt. Rec'd ________	Check # ________
Date Rec'd ________	SMART Form ________
Date Rec'd ________	Signatures ________
Checked by ________	________

WHITE — OFFICE • YELLOW — BUSINESS OFFICE • PINK — PARENT

Montessori schools increasingly include additional services and programs as options for parents. This example is for extended child care.

Bus Transportation Contract, Tall Pines School (Brampton, Ontario)



TALL PINES SCHOOL

__Two Way Bus Transportation Contract__

I, ______________________________ agree to pay the sum of one thousand two hundred fifty dollars ($1250.00) for the purpose of transporting my child ____________

from ______________________________

to Tall Pines School

and from Tall Pines School

to ______________________________

This amount is payable in one payment of $1250.00 or in ten monthly post-dated cheques dated August 15th, 1997 to May 15th, 1998 in the amount of $125.00. I understand that this is a yearly charge and may be paid on a monthly basis for my convenience only

I further agree that Tall Pines School reserves the right to suspend this service on days when buses operated by the Peel Board of Education are cancelled due to extreme weather conditions.

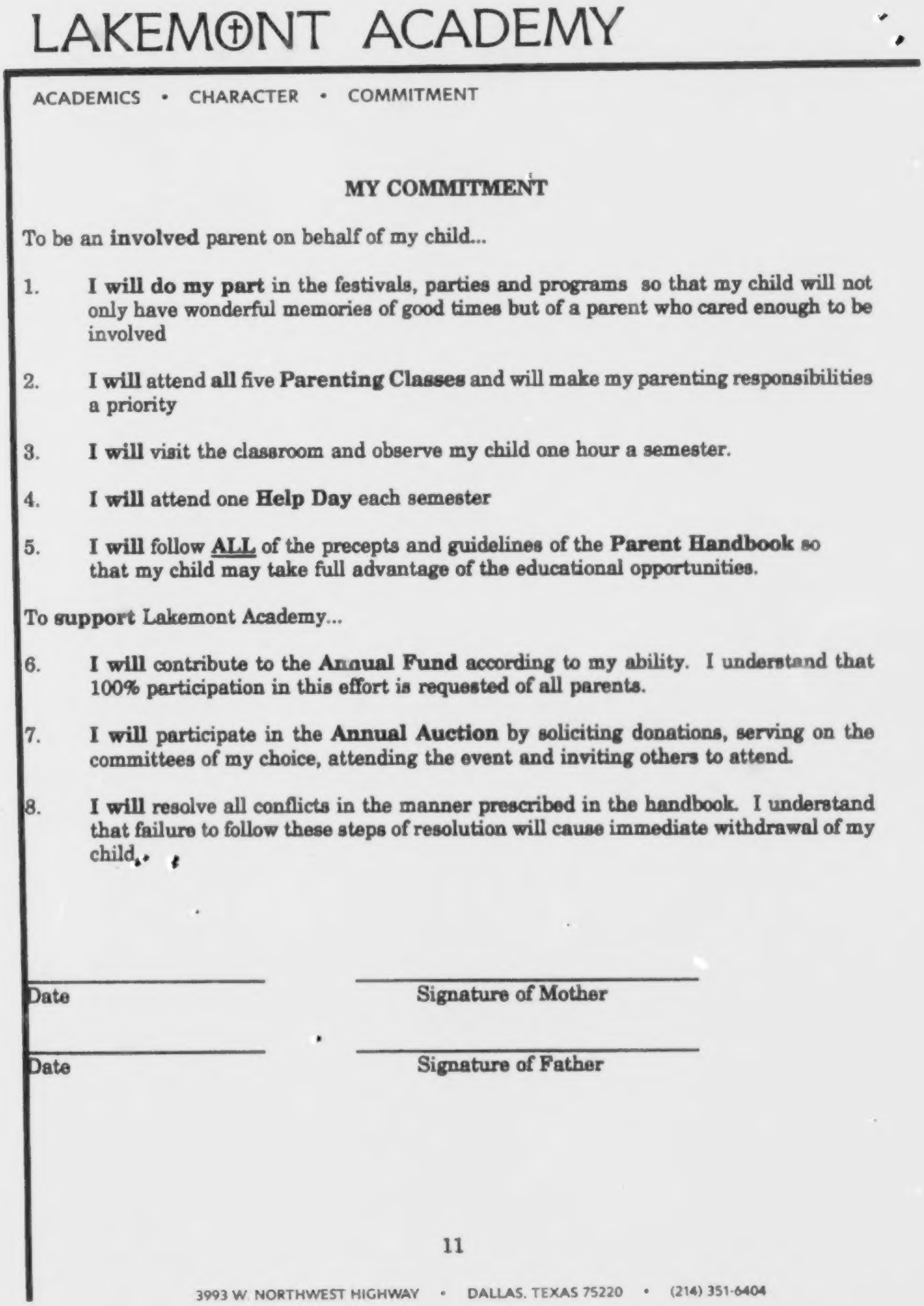
Dated: ______________________________

Signed: ______________________________

8525 Torbram Road, Brampton, Ontario L6T 5K4 Telephone (905) 458-6770 Fax (905) 458-7967

Transportation as an additional service at the parents' option.

Parent Commitment, Lakemont Academy (Dallas, TX)



LAKEMONT ACADEMY

ACADEMICS • CHARACTER • COMMITMENT

MY COMMITMENT

To be an **involved** parent on behalf of my child...

1. **I will do my part** in the festivals, parties and programs so that my child will not only have wonderful memories of good times but of a parent who cared enough to be involved
2. **I will** attend all five **Parenting Classes** and will make my parenting responsibilities a priority
3. **I will** visit the classroom and observe my child one hour a semester.
4. **I will** attend one **Help Day** each semester
5. **I will** follow ALL of the precepts and guidelines of the **Parent Handbook** so that my child may take full advantage of the educational opportunities.

To **support** Lakemont Academy...

6. **I will** contribute to the **Annual Fund** according to my ability. I understand that 100% participation in this effort is requested of all parents.
7. **I will** participate in the **Annual Auction** by soliciting donations, serving on the committees of my choice, attending the event and inviting others to attend.
8. **I will** resolve all conflicts in the manner prescribed in the handbook. I understand that failure to follow these steps of resolution will cause immediate withdrawal of my child.

Date ____________ Signature of Mother ____________

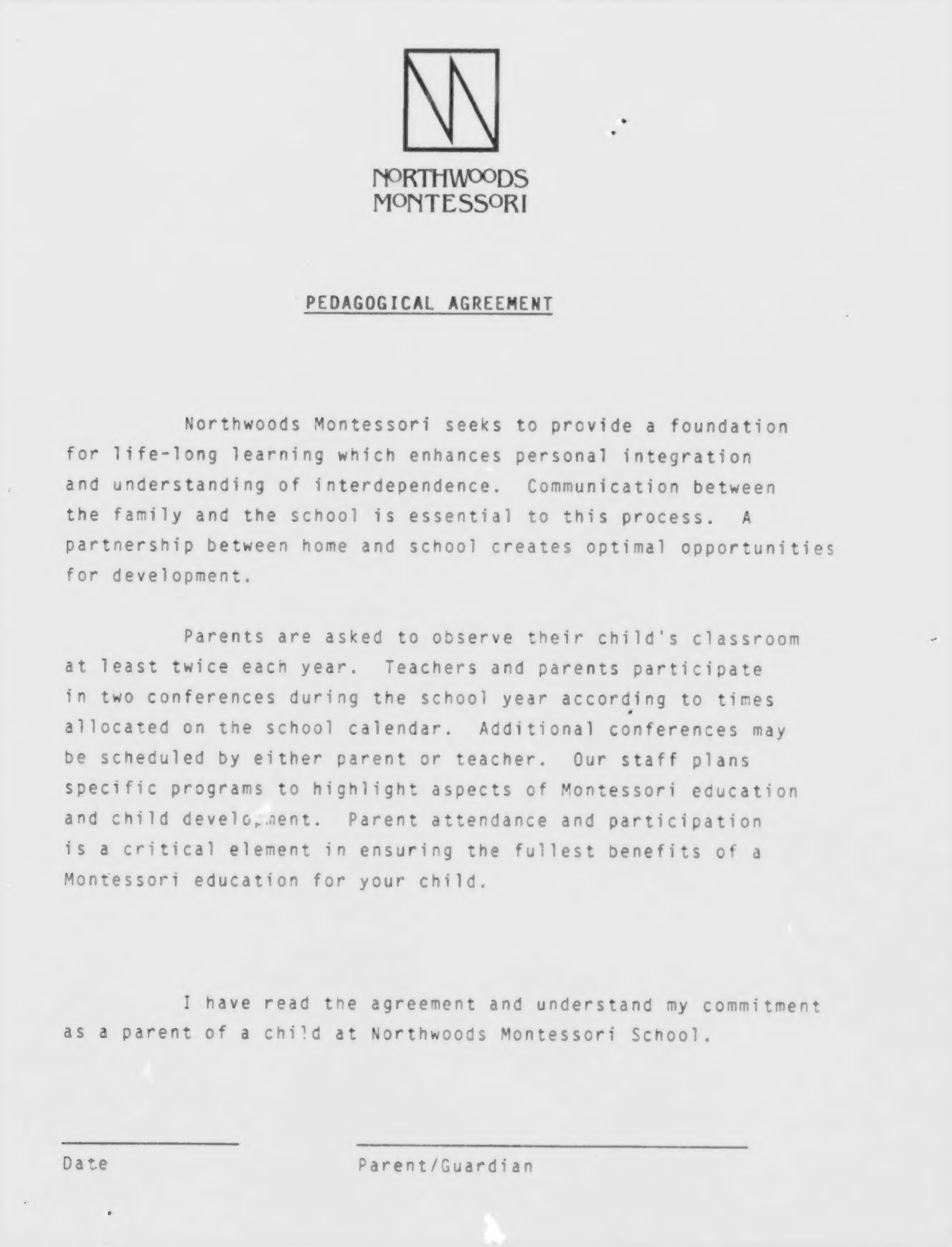
Date ____________ Signature of Father ____________

11

3993 W. NORTHWEST HIGHWAY • DALLAS, TEXAS 75220 • (214) 351-6404

This commitment form asks new parents to acknowledge their responsibilities within the context of the school/family partnership.

Pedagogical Agreement, Northwoods Montessori School (Atlanta, GA)



NORTHWOODS
MONTESSORI

PEDAGOGICAL AGREEMENT

Northwoods Montessori seeks to provide a foundation for life-long learning which enhances personal integration and understanding of interdependence. Communication between the family and the school is essential to this process. A partnership between home and school creates optimal opportunities for development.

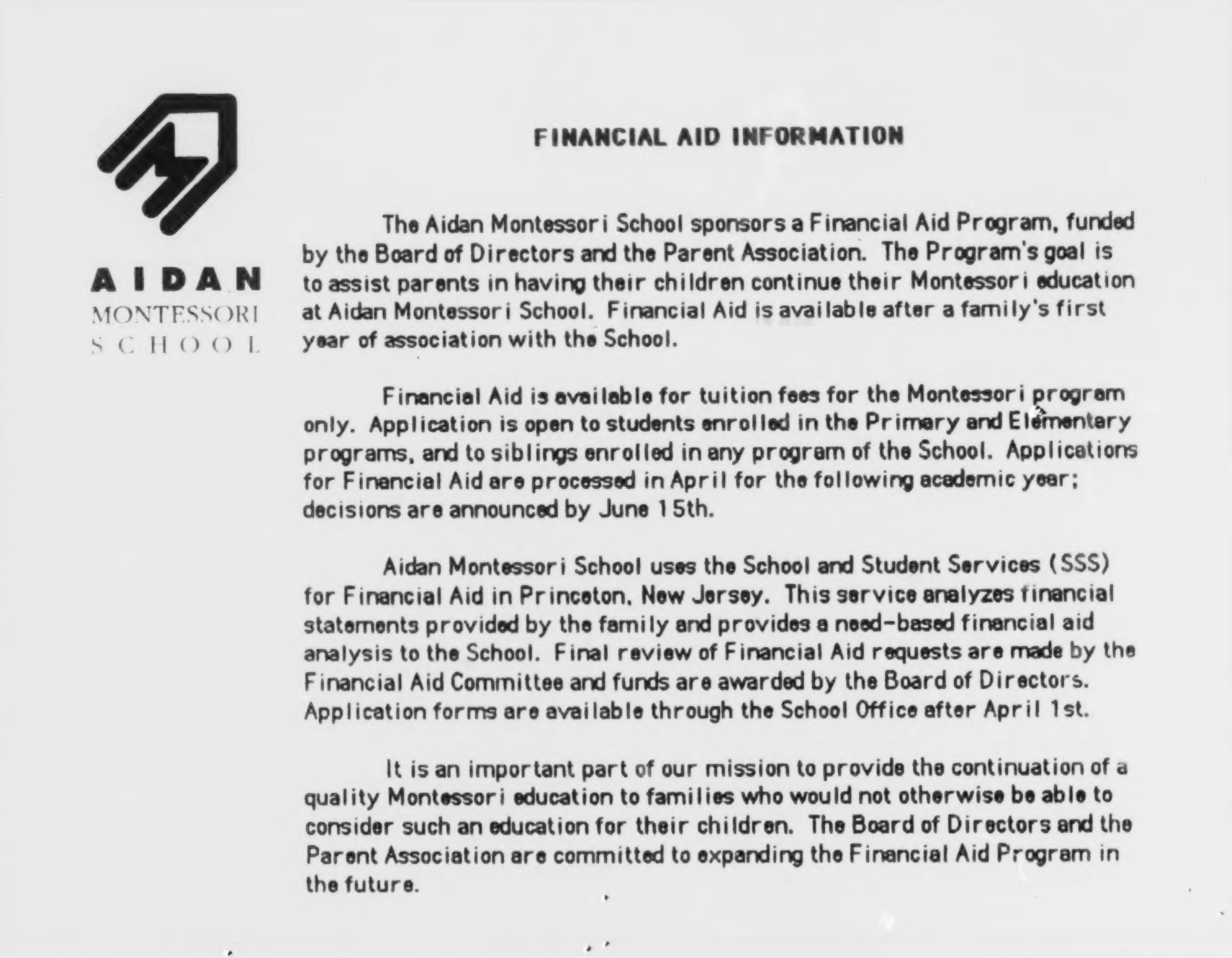
Parents are asked to observe their child's classroom at least twice each year. Teachers and parents participate in two conferences during the school year according to times allocated on the school calendar. Additional conferences may be scheduled by either parent or teacher. Our staff plans specific programs to highlight aspects of Montessori education and child development. Parent attendance and participation is a critical element in ensuring the fullest benefits of a Montessori education for your child.

I have read the agreement and understand my commitment as a parent of a child at Northwoods Montessori School.

________________ ______________________________
Date Parent/Guardian

Another example of a form that asks parents to commit to the school/family partnership.

Financial Aid Information, Aidan Montessori School (Washington, DC)



AIDAN
MONTESSORI
SCHOOL

FINANCIAL AID INFORMATION

The Aidan Montessori School sponsors a Financial Aid Program, funded by the Board of Directors and the Parent Association. The Program's goal is to assist parents in having their children continue their Montessori education at Aidan Montessori School. Financial Aid is available after a family's first year of association with the School.

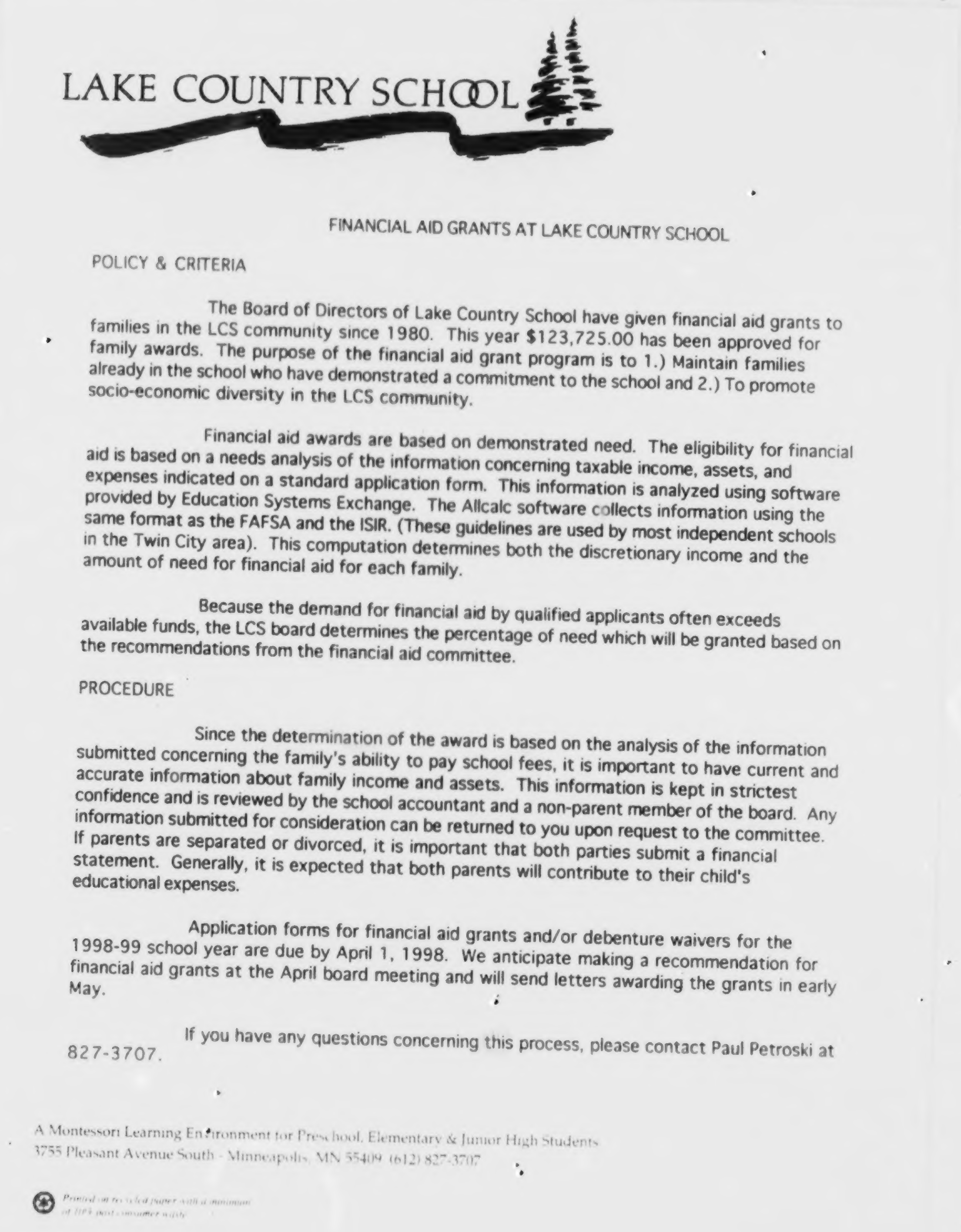
Financial Aid is available for tuition fees for the Montessori program only. Application is open to students enrolled in the Primary and Elementary programs, and to siblings enrolled in any program of the School. Applications for Financial Aid are processed in April for the following academic year; decisions are announced by June 15th.

Aidan Montessori School uses the School and Student Services (SSS) for Financial Aid in Princeton, New Jersey. This service analyzes financial statements provided by the family and provides a need-based financial aid analysis to the School. Final review of Financial Aid requests are made by the Financial Aid Committee and funds are awarded by the Board of Directors. Application forms are available through the School Office after April 1st.

It is an important part of our mission to provide the continuation of a quality Montessori education to families who would not otherwise be able to consider such an education for their children. The Board of Directors and the Parent Association are committed to expanding the Financial Aid Program in the future.

This information sheet clearly defines the school's rationale for financial aid awards

Financial Aid Packet, Lake Country School (Minneapolis, MN)



LAKE COUNTRY SCHOOL

FINANCIAL AID GRANTS AT LAKE COUNTRY SCHOOL

POLICY & CRITERIA

The Board of Directors of Lake Country School have given financial aid grants to families in the LCS community since 1980. This year $123,725.00 has been approved for family awards. The purpose of the financial aid grant program is to 1.) Maintain families already in the school who have demonstrated a commitment to the school and 2.) To promote socio-economic diversity in the LCS community.

Financial aid awards are based on demonstrated need. The eligibility for financial aid is based on a needs analysis of the information concerning taxable income, assets, and expenses indicated on a standard application form. This information is analyzed using software provided by Education Systems Exchange. The Allcalc software collects information using the same format as the FAFSA and the ISIR. (These guidelines are used by most independent schools in the Twin City area). This computation determines both the discretionary income and the amount of need for financial aid for each family.

Because the demand for financial aid by qualified applicants often exceeds available funds, the LCS board determines the percentage of need which will be granted based on the recommendations from the financial aid committee.

PROCEDURE

Since the determination of the award is based on the analysis of the information submitted concerning the family's ability to pay school fees, it is important to have current and accurate information about family income and assets. This information is kept in strictest confidence and is reviewed by the school accountant and a non-parent member of the board. Any information submitted for consideration can be returned to you upon request to the committee. If parents are separated or divorced, it is important that both parties submit a financial statement. Generally, it is expected that both parents will contribute to their child's educational expenses.

Application forms for financial aid grants and/or debenture waivers for the 1998-99 school year are due by April 1, 1998. We anticipate making a recommendation for financial aid grants at the April board meeting and will send letters awarding the grants in early May.

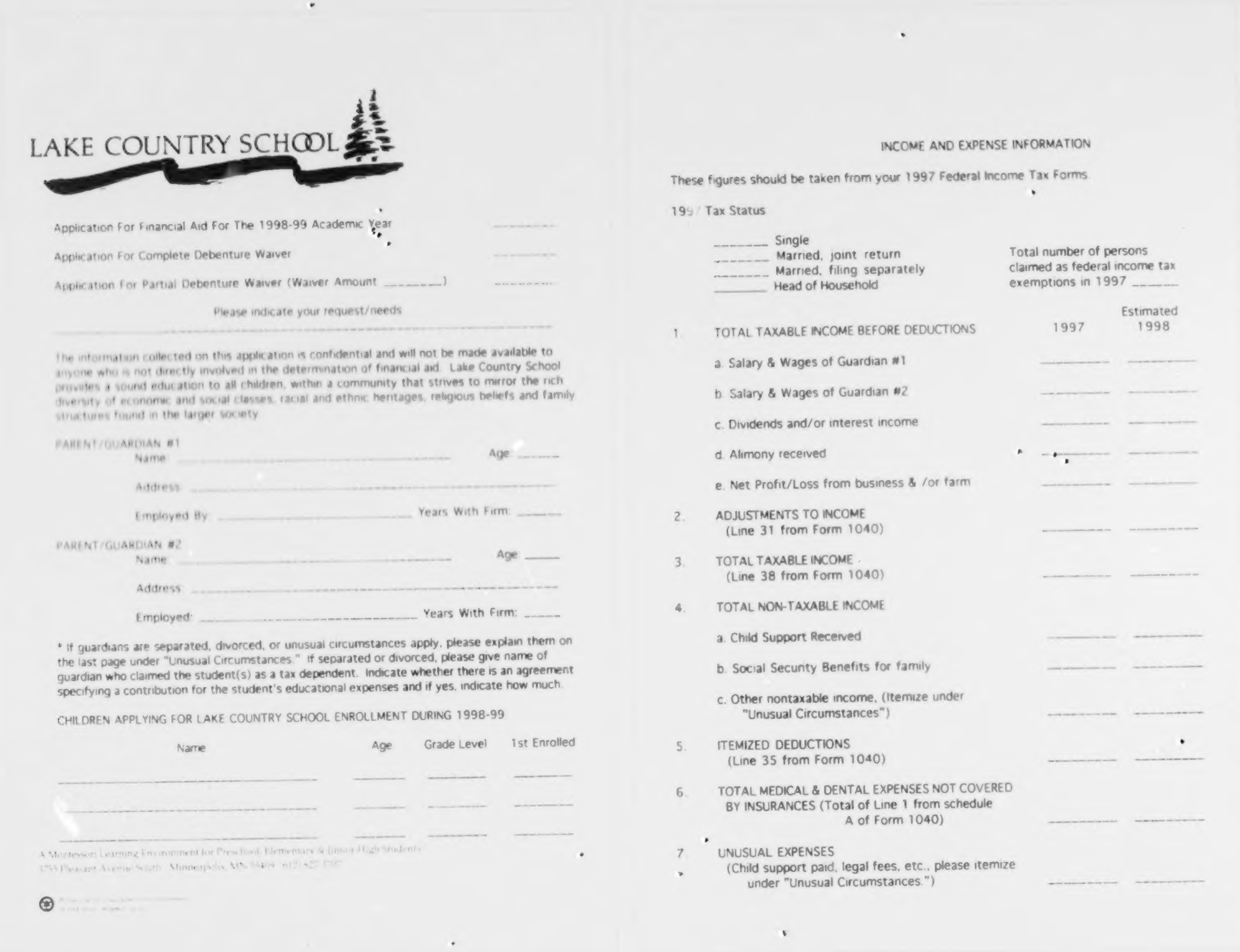
If you have any questions concerning this process, please contact Paul Petroski at 827-3707.

A Montessori Learning Environment for Preschool, Elementary & Junior High Students
3755 Pleasant Avenue South - Minneapolis, MN 55409 (612) 827-3707

Printed on recycled paper with a minimum of 10% post consumer waste

A good example of a financial aid application that includes both a statement of policy and criteria for awards.

Financial Aid Packet, Lake Country School (continued)



LAKE COUNTRY SCHOOL

Application For Financial Aid For The 1998-99 Academic Year ________

Application For Complete Debenture Waiver ________

Application For Partial Debenture Waiver (Waiver Amount ________) ________

Please indicate your request/needs

____

The information collected on this application is confidential and will not be made available to anyone who is not directly involved in the determination of financial aid. Lake Country School provides a sound education to all children, within a community that strives to mirror the rich diversity of economic and social classes, racial and ethnic heritages, religious beliefs and family structures found in the larger society.

PARENT/GUARDIAN #1

Name: ________________________ Age: ______

Address: ________________________

Employed By: ________________ Years With Firm: ______

PARENT/GUARDIAN #2

Name: ________________________ Age: ______

Address: ________________________

Employed: ________________ Years With Firm: ______

* If guardians are separated, divorced, or unusual circumstances apply, please explain them on the last page under "Unusual Circumstances." If separated or divorced, please give name of guardian who claimed the student(s) as a tax dependent. Indicate whether there is an agreement specifying a contribution for the student's educational expenses and if yes, indicate how much.

CHILDREN APPLYING FOR LAKE COUNTRY SCHOOL ENROLLMENT DURING 1998-99

Name	Age	Grade Level	1st Enrolled

A Montessori Learning Environment for Preschool, Elementary & Junior High Students
3755 Pleasant Avenue South · Minneapolis, MN 55409 · (612) 827-[illegible]

INCOME AND EXPENSE INFORMATION

These figures should be taken from your 1997 Federal Income Tax Forms.

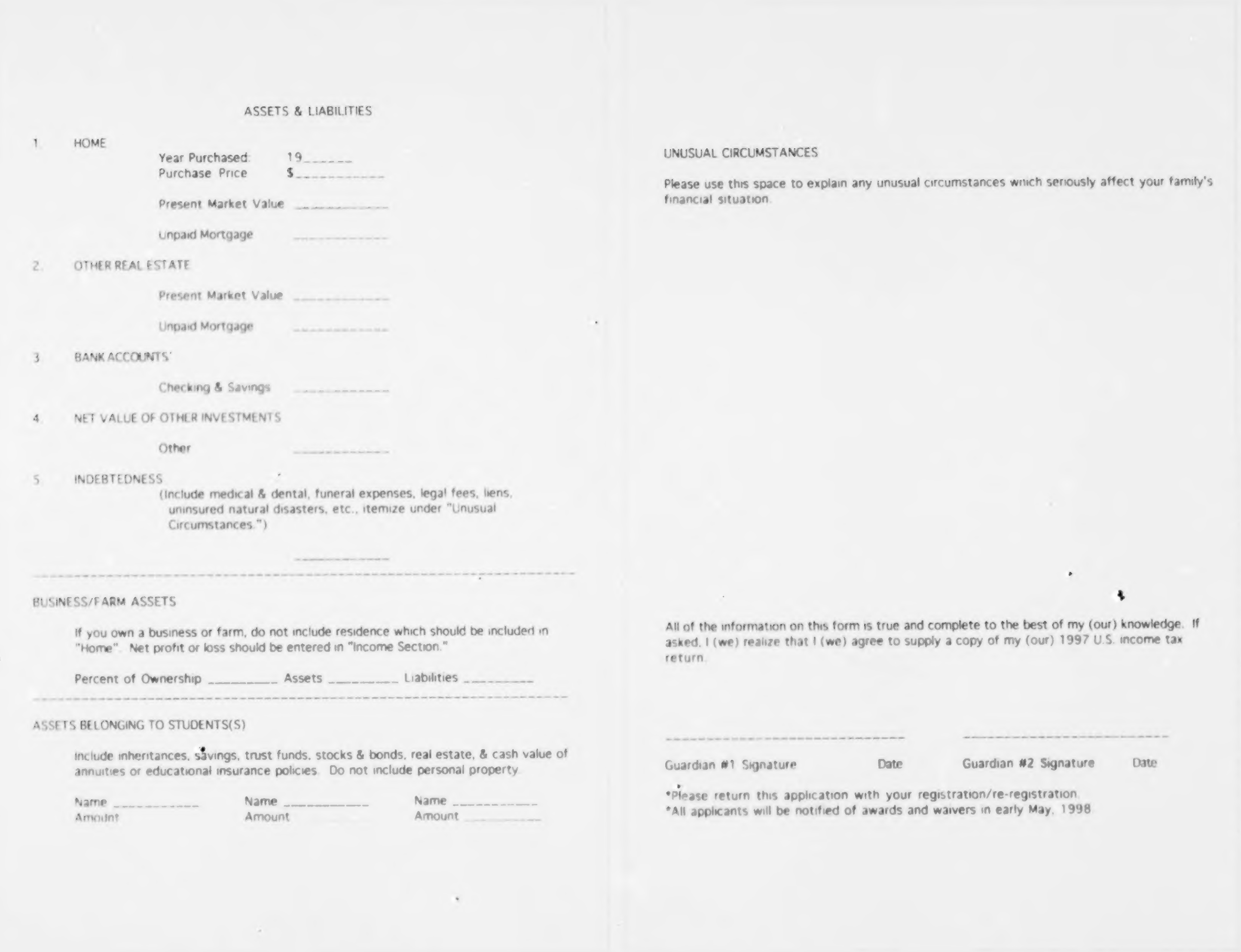
1997 Tax Status

______ Single
______ Married, joint return
______ Married, filing separately
______ Head of Household

Total number of persons claimed as federal income tax exemptions in 1997 ______

		1997	Estimated 1998
1.	TOTAL TAXABLE INCOME BEFORE DEDUCTIONS		
	a. Salary & Wages of Guardian #1		
	b. Salary & Wages of Guardian #2		
	c. Dividends and/or interest income		
	d. Alimony received		
	e. Net Profit/Loss from business & /or farm		
2.	ADJUSTMENTS TO INCOME (Line 31 from Form 1040)		
3.	TOTAL TAXABLE INCOME (Line 38 from Form 1040)		
4.	TOTAL NON-TAXABLE INCOME		
	a. Child Support Received		
	b. Social Security Benefits for family		
	c. Other nontaxable income, (Itemize under "Unusual Circumstances")		
5.	ITEMIZED DEDUCTIONS (Line 35 from Form 1040)		
6.	TOTAL MEDICAL & DENTAL EXPENSES NOT COVERED BY INSURANCES (Total of Line 1 from schedule A of Form 1040)		
7.	UNUSUAL EXPENSES (Child support paid, legal fees, etc., please itemize under "Unusual Circumstances.")		

Financial Aid Packet, Lake Country School (continued)



ASSETS & LIABILITIES

1. HOME
   Year Purchased: 19______
   Purchase Price $____________
   Present Market Value ____________
   Unpaid Mortgage ____________
2. OTHER REAL ESTATE
   Present Market Value ____________
   Unpaid Mortgage ____________
3. BANK ACCOUNTS
   Checking & Savings ____________
4. NET VALUE OF OTHER INVESTMENTS
   Other ____________
5. INDEBTEDNESS
   (Include medical & dental, funeral expenses, legal fees, liens, uninsured natural disasters, etc., itemize under "Unusual Circumstances.")
   ____

BUSINESS/FARM ASSETS

If you own a business or farm, do not include residence which should be included in "Home". Net profit or loss should be entered in "Income Section."

Percent of Ownership __________ Assets __________ Liabilities __________

ASSETS BELONGING TO STUDENTS(S)

Include inheritances, savings, trust funds, stocks & bonds, real estate, & cash value of annuities or educational insurance policies. Do not include personal property.

Name ____________ Name ____________ Name ____________
Amount Amount Amount ____________

UNUSUAL CIRCUMSTANCES

Please use this space to explain any unusual circumstances which seriously affect your family's financial situation.

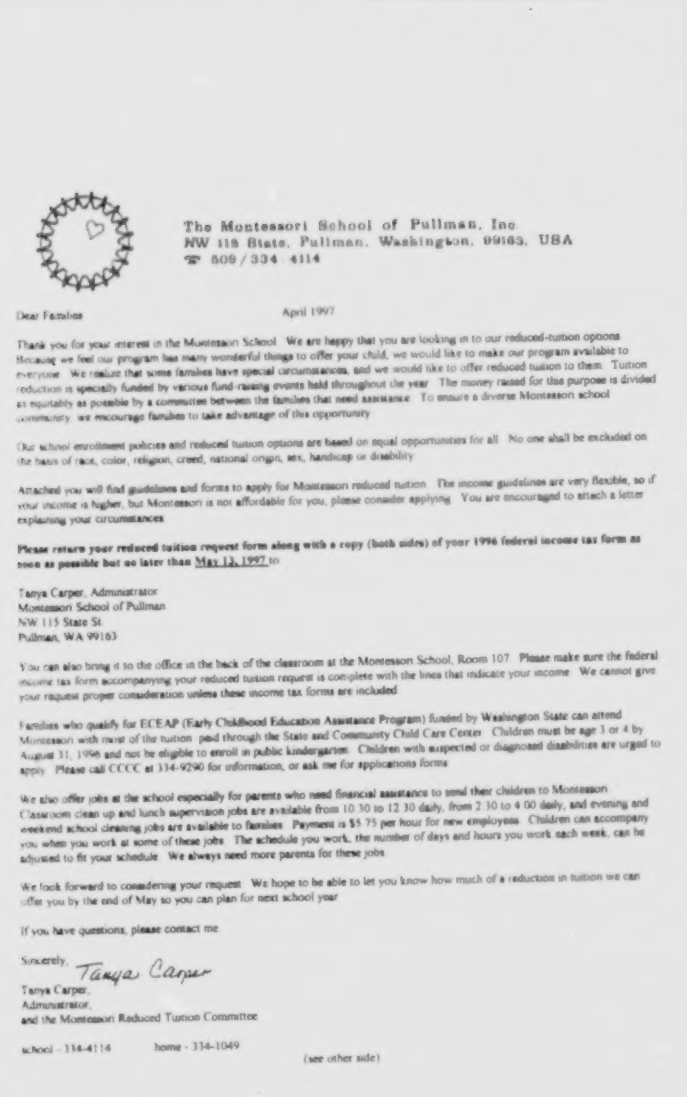
All of the information on this form is true and complete to the best of my (our) knowledge. If asked, I (we) realize that I (we) agree to supply a copy of my (our) 1997 U.S. income tax return.

______________________________ ______________________________
Guardian #1 Signature Date Guardian #2 Signature Date

*Please return this application with your registration/re-registration.
*All applicants will be notified of awards and waivers in early May, 1998.

BEST COPY AVAILABLE

Reduced Tuition Packet, Montessori School of Pullman (Pullman, WA)



The Montessori School of Pullman, Inc.
NW 115 State, Pullman, Washington, 99163, USA
☎ 509 / 334 - 4114

Dear Families

April 1997

Thank you for your interest in the Montessori School. We are happy that you are looking in to our reduced-tuition options. Because we feel our program has many wonderful things to offer your child, we would like to make our program available to everyone. We realize that some families have special circumstances, and we would like to offer reduced tuition to them. Tuition reduction is specially funded by various fund-raising events held throughout the year. The money raised for this purpose is divided as equitably as possible by a committee between the families that need assistance. To ensure a diverse Montessori school community, we encourage families to take advantage of this opportunity.

Our school enrollment policies and reduced tuition options are based on equal opportunities for all. No one shall be excluded on the basis of race, color, religion, creed, national origin, sex, handicap or disability.

Attached you will find guidelines and forms to apply for Montessori reduced tuition. The income guidelines are very flexible, so if your income is higher, but Montessori is not affordable for you, please consider applying. You are encouraged to attach a letter explaining your circumstances.

Please return your reduced tuition request form along with a copy (both sides) of your 1996 federal income tax form as soon as possible but no later than May 13, 1997 to

Tanya Carper, Administrator
Montessori School of Pullman
NW 115 State St
Pullman, WA 99163

You can also bring it to the office in the back of the classroom at the Montessori School, Room 107. Please make sure the federal income tax form accompanying your reduced tuition request is complete with the lines that indicate your income. We cannot give your request proper consideration unless these income tax forms are included.

Families who qualify for ECEAP (Early Childhood Education Assistance Program) funded by Washington State can attend Montessori with most of the tuition paid through the State and Community Child Care Center. Children must be age 3 or 4 by August 31, 1996 and not be eligible to enroll in public kindergarten. Children with suspected or diagnosed disabilities are urged to apply. Please call CCCC at 334-9290 for information, or ask me for applications forms.

We also offer jobs at the school especially for parents who need financial assistance to send their children to Montessori. Classroom clean up and lunch supervision jobs are available from 10:30 to 12:30 daily, from 2:30 to 4:00 daily, and evening and weekend school cleaning jobs are available to families. Payment is $5.75 per hour for new employees. Children can accompany you when you work at some of these jobs. The schedule you work, the number of days and hours you work each week, can be adjusted to fit your schedule. We always need more parents for these jobs.

We look forward to considering your request. We hope to be able to let you know how much of a reduction in tuition we can offer you by the end of May so you can plan for next school year.

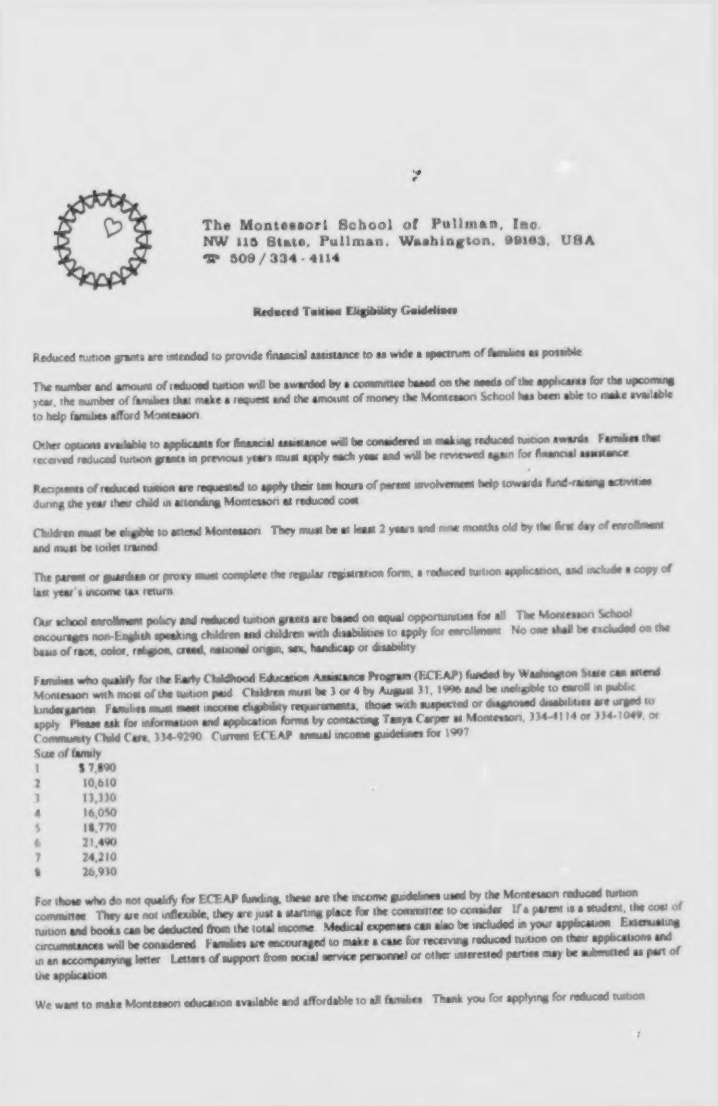
If you have questions, please contact me.

Sincerely, Tanya Carper

Tanya Carper,
Administrator,
and the Montessori Reduced Tuition Committee

school - 334-4114 home - 334-1049

(see other side)



The Montessori School of Pullman, Inc.
NW 115 State, Pullman, Washington, 99163, USA
☎ 509 / 334 - 4114

Reduced Tuition Eligibility Guidelines

Reduced tuition grants are intended to provide financial assistance to as wide a spectrum of families as possible.

The number and amount of reduced tuition will be awarded by a committee based on the needs of the applicants for the upcoming year, the number of families that make a request and the amount of money the Montessori School has been able to make available to help families afford Montessori.

Other options available to applicants for financial assistance will be considered in making reduced tuition awards. Families that received reduced tuition grants in previous years must apply each year and will be reviewed again for financial assistance.

Recipients of reduced tuition are requested to apply their ten hours of parent involvement help towards fund-raising activities during the year their child is attending Montessori at reduced cost.

Children must be eligible to attend Montessori. They must be at least 2 years and nine months old by the first day of enrollment and must be toilet trained.

The parent or guardian or proxy must complete the regular registration form, a reduced tuition application, and include a copy of last year's income tax return.

Our school enrollment policy and reduced tuition grants are based on equal opportunities for all. The Montessori School encourages non-English speaking children and children with disabilities to apply for enrollment. No one shall be excluded on the basis of race, color, religion, creed, national origin, sex, handicap or disability.

Families who qualify for the Early Childhood Education Assistance Program (ECEAP) funded by Washington State can attend Montessori with most of the tuition paid. Children must be 3 or 4 by August 31, 1996 and be ineligible to enroll in public kindergarten. Families must meet income eligibility requirements; those with suspected or diagnosed disabilities are urged to apply. Please ask for information and application forms by contacting Tanya Carper at Montessori, 334-4114 or 334-1049, or Community Child Care, 334-9290. Current ECEAP annual income guidelines for 1997

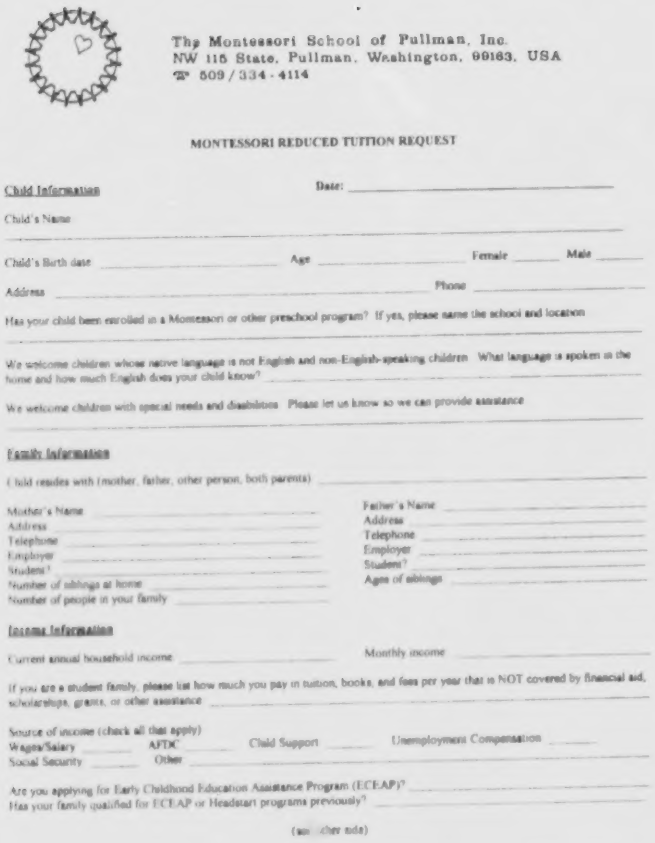
Size of family	
1	$ 7,890
2	10,610
3	13,330
4	16,050
5	18,770
6	21,490
7	24,210
8	26,930

For those who do not qualify for ECEAP funding, these are the income guidelines used by the Montessori reduced tuition committee. They are not inflexible, they are just a starting place for the committee to consider. If a parent is a student, the cost of tuition and books can be deducted from the total income. Medical expenses can also be included in your application. Extenuating circumstances will be considered. Families are encouraged to make a case for receiving reduced tuition on their applications and in an accompanying letter. Letters of support from social service personnel or other interested parties may be submitted as part of the application.

We want to make Montessori education available and affordable to all families. Thank you for applying for reduced tuition.

This packet, including both information and an application, outlines several reduced tuition options

Reduced Tuition Packet, Montessori School of Pullman (continued)



The Montessori School of Pullman, Inc.
NW 115 State, Pullman, Washington, 99163, USA
☎ 509 / 334 - 4114

MONTESSORI REDUCED TUITION REQUEST

Child Information Date: ______

Child's Name ______

Child's Birth date ______ Age ______ Female ______ Male ______

Address ______ Phone ______

Has your child been enrolled in a Montessori or other preschool program? If yes, please name the school and location ______

We welcome children whose native language is not English and non-English-speaking children. What language is spoken in the home and how much English does your child know? ______

We welcome children with special needs and disabilities. Please let us know so we can provide assistance ______

Family Information

Child resides with (mother, father, other person, both parents) ______

Mother's Name ______	Father's Name ______
Address ______	Address ______
Telephone ______	Telephone ______
Employer ______	Employer ______
Student? ______	Student? ______
Number of siblings at home ______	Ages of siblings ______
Number of people in your family ______	

Income Information

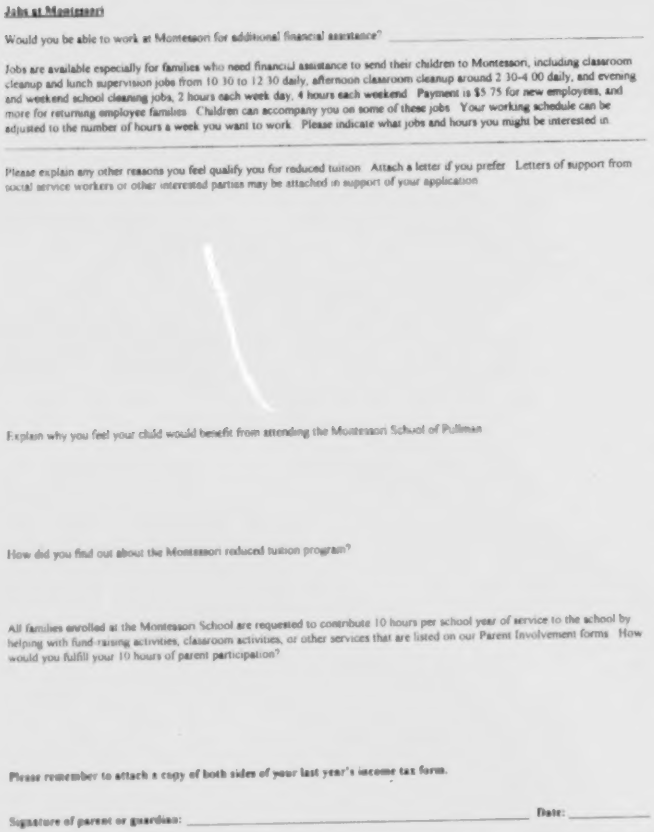
Current annual household income ______ Monthly income ______

If you are a student family, please list how much you pay in tuition, books, and fees per year that is NOT covered by financial aid, scholarships, grants, or other assistance ______

Source of income (check all that apply)
Wages/Salary ______ AFDC ______ Child Support ______ Unemployment Compensation ______
Social Security ______ Other ______

Are you applying for Early Childhood Education Assistance Program (ECEAP)? ______
Has your family qualified for ECEAP or Headstart programs previously? ______

(see other side)



Jobs at Montessori

Would you be able to work at Montessori for additional financial assistance? ______

Jobs are available especially for families who need financial assistance to send their children to Montessori, including classroom cleanup and lunch supervision jobs from 10 30 to 12 30 daily, afternoon classroom cleanup around 2 30-4 00 daily, and evening and weekend school cleaning jobs, 2 hours each week day, 4 hours each weekend. Payment is $5 75 for new employees, and more for returning employee families. Children can accompany you on some of these jobs. Your working schedule can be adjusted to the number of hours a week you want to work. Please indicate what jobs and hours you might be interested in ______

Please explain any other reasons you feel qualify you for reduced tuition. Attach a letter if you prefer. Letters of support from social service workers or other interested parties may be attached in support of your application

Explain why you feel your child would benefit from attending the Montessori School of Pullman

How did you find out about the Montessori reduced tuition program?

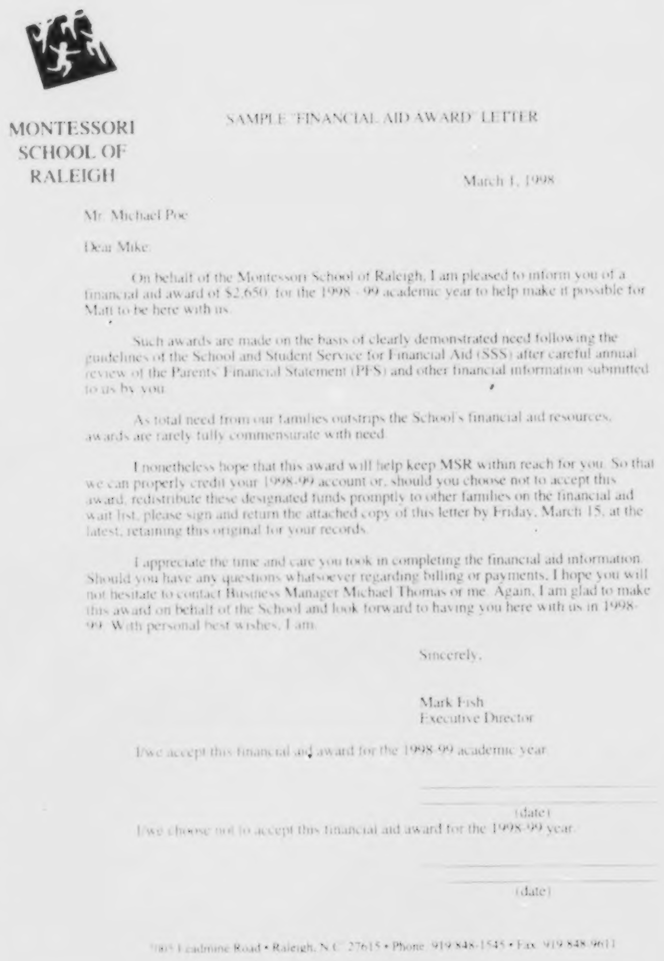
All families enrolled at the Montessori School are requested to contribute 10 hours per school year of service to the school by helping with fund-raising activities, classroom activities, or other services that are listed on our Parent Involvement forms. How would you fulfill your 10 hours of parent participation?

Please remember to attach a copy of both sides of your last year's income tax form.

Signature of parent or guardian: ______ **Date:** ______

Financial Aid Letters, Montessori School of Raleigh (Raleigh, NC)

Letters informing parents of the results of their financial aid application call for sensitivity. These two examples are clear and compassionate. In the case of an award, the letter asks for a statement of acceptance or non-acceptance. In the case where the candidate did not qualify for an award, assistance and flexibility are offered.



MONTESSORI
SCHOOL OF
RALEIGH

SAMPLE "FINANCIAL AID AWARD" LETTER

March 1, 1998

Mr. Michael Poe

Dear Mike:

On behalf of the Montessori School of Raleigh, I am pleased to inform you of a financial aid award of $2,650. for the 1998 - 99 academic year to help make it possible for Matt to be here with us.

Such awards are made on the basis of clearly demonstrated need following the guidelines of the School and Student Service for Financial Aid (SSS) after careful annual review of the Parents' Financial Statement (PFS) and other financial information submitted to us by you.

As total need from our families outstrips the School's financial aid resources, awards are rarely fully commensurate with need.

I nonetheless hope that this award will help keep MSR within reach for you. So that we can properly credit your 1998-99 account or, should you choose not to accept this award, redistribute these designated funds promptly to other families on the financial aid wait list, please sign and return the attached copy of this letter by Friday, March 15, at the latest, retaining this original for your records.

I appreciate the time and care you took in completing the financial aid information. Should you have any questions whatsoever regarding billing or payments, I hope you will not hesitate to contact Business Manager Michael Thomas or me. Again, I am glad to make this award on behalf of the School and look forward to having you here with us in 1998-99. With personal best wishes, I am.

Sincerely,

Mark Fish
Executive Director

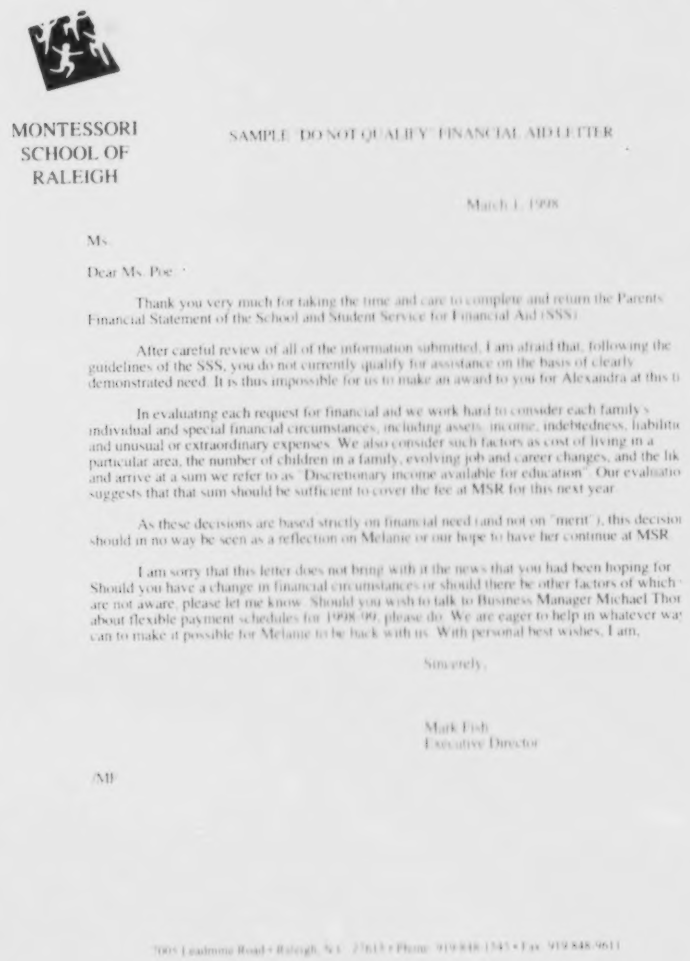
I/we accept this financial aid award for the 1998-99 academic year.

____
____
(date)

I/we choose not to accept this financial aid award for the 1998-99 year.

____
____
(date)

7805 Leadmine Road • Raleigh, N.C. 27615 • Phone: 919-848-1545 • Fax: 919-848-9611



MONTESSORI
SCHOOL OF
RALEIGH

SAMPLE "DO NOT QUALIFY" FINANCIAL AID LETTER

March 1, 1998

Ms.

Dear Ms. Poe:

Thank you very much for taking the time and care to complete and return the Parents Financial Statement of the School and Student Service for Financial Aid (SSS).

After careful review of all of the information submitted, I am afraid that, following the guidelines of the SSS, you do not currently qualify for assistance on the basis of clearly demonstrated need. It is thus impossible for us to make an award to you for Alexandra at this ti

In evaluating each request for financial aid we work hard to consider each family's individual and special financial circumstances, including assets, income, indebtedness, liabiliti and unusual or extraordinary expenses. We also consider such factors as cost of living in a particular area, the number of children in a family, evolving job and career changes, and the lik and arrive at a sum we refer to as "Discretionary income available for education". Our evaluatio suggests that that sum should be sufficient to cover the fee at MSR for this next year.

As these decisions are based strictly on financial need (and not on "merit"), this decisio should in no way be seen as a reflection on Melanie or our hope to have her continue at MSR.

I am sorry that this letter does not bring with it the news that you had been hoping for. Should you have a change in financial circumstances or should there be other factors of which are not aware, please let me know. Should you wish to talk to Business Manager Michael Thor about flexible payment schedules for 1998-99, please do. We are eager to help in whatever wa can to make it possible for Melanie to be back with us. With personal best wishes, I am,

Sincerely,

Mark Fish
Executive Director

/MF

7805 Leadmine Road • Raleigh, N.C. 27615 • Phone: 919-848-1545 • Fax: 919-848-9611

BEST COPY AVAILABLE

Child and Family Profiles, The Post Oak School (Bellaire, TX)

These forms are good examples of child and family profiles for both the newly enrolling young child and the older child.

THE POST OAK SCHOOL

ESTABLISHED [illegible]
ASSOCIATION MONTESSORI
INTERNATIONALE

[illegible] BISSONNET ST
BELLAIRE TX [illegible]
AREA CODE [illegible]
FAX [illegible]

THE POST OAK SCHOOL
ELEMENTARY / MIDDLE SCHOOL
PARENT QUESTIONNAIRE

Thank you for completing this questionnaire. This will enable us to better understand the needs of your child.

Parent s Name ______________________________

Child s Name ____________________ Age ________ DOB ____________

I Health Information

A number of days ill last year ______________________________

B medications if any ______________________________

C other health information if any ______________________________

____

II Family and child care information

A Siblings

Name ____________________ age ____________

Name ____________________ age ____________

Name ____________________ age ____________

B Living Arrangements

During the week ? ______________________________

Weekends ? ______________________________

Who takes care of the child besides the parent(s)? ______________________________

____

____

____

E Is your child involved in other group participation activities? Please describe these ____________

____

____

____

II Routines

A Are mealtimes at a set time? ________ With adults? ________ Which ones? ____________

Where? ____________ Does your child help? ________ If so how? ____________

____

What is the usual mealtime routine? ______________________________

____

____

B How do you go about getting your child to bed at night and at what time? ____________

____

C Does your child watch TV? ____________ How long? ____________

With whom? ______________________________

Does your child play video games and, if so for how long? ____________

____

____

Does your child work on the computer and, if so for how long? ____________

____

____

D Does your child participate in household chores, duties, or other family responsibilities? ____________

____

Child and Family Profiles, The Post Oak School (continued)

F Give any other helpful information about routines

III Health information

A Number of days ill last year

B Medications, if any

C Other health information, if any

IV Child's characteristics/personality

A Choose five words that describe your child

B What do you consider to be your child's greatest strengths?

V Educational background

A Please list all schools your child has attended

Name of School City, State Dates Attended

B Please explain reasons for changing schools in the past

C Describe your child's academic strengths and subject preferences

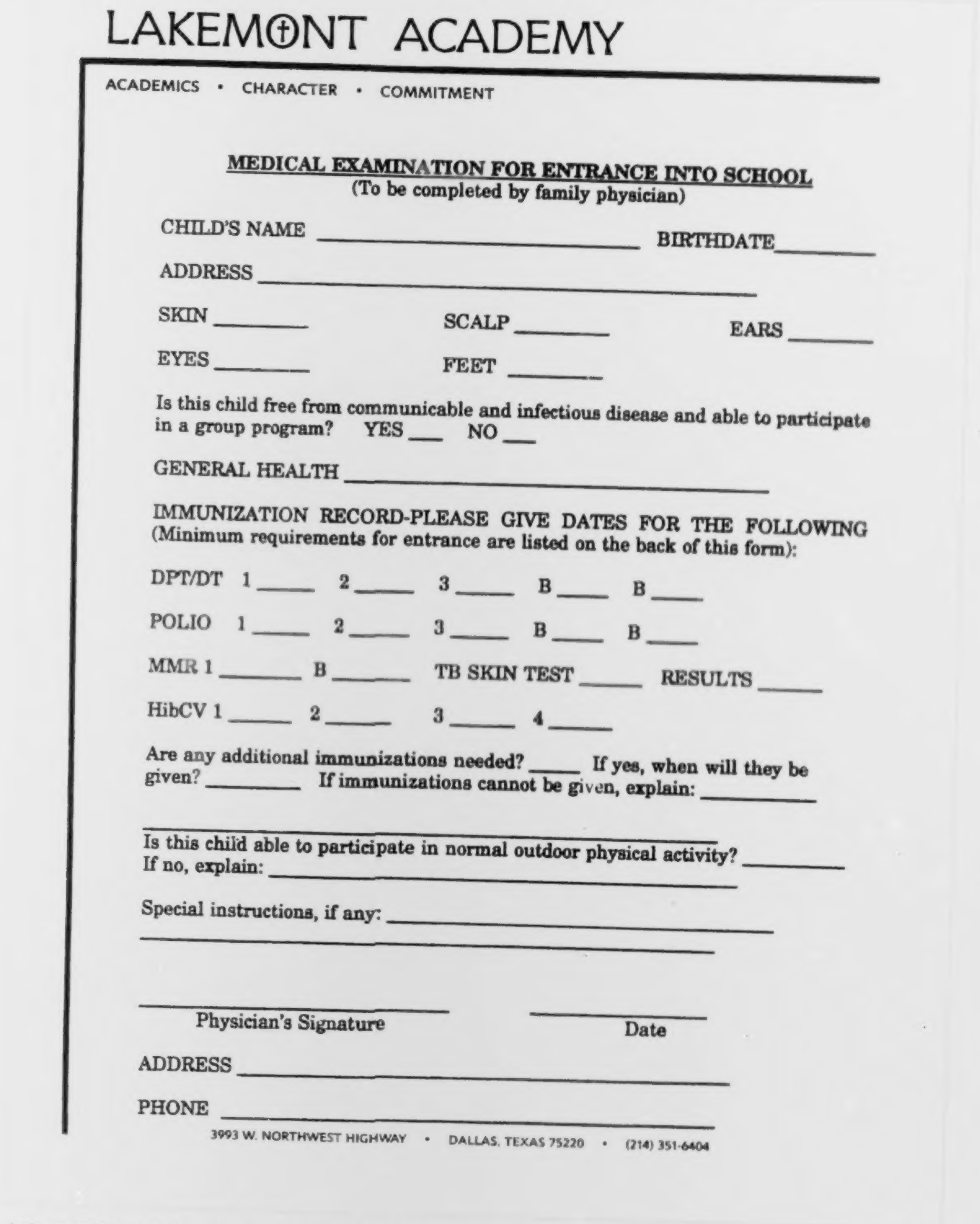
D Does your child have any clinically diagnosed learning differences?

E Has additional testing, tutoring or counseling been suggested for your child? If so, what steps were taken?

F In what areas (academic, social, emotional) do you hope to see your child make the most progress? If you have concerns, what are they?

G Why do you want your child to be in a Montessori school?

Medical Form, Lakemont Academy (Dallas, TX)



LAKEMONT ACADEMY

ACADEMICS • CHARACTER • COMMITMENT

MEDICAL EXAMINATION FOR ENTRANCE INTO SCHOOL
(To be completed by family physician)

CHILD'S NAME ______________________ BIRTHDATE ________

ADDRESS ________________________________

SKIN ________ SCALP ________ EARS ________

EYES ________ FEET ________

Is this child free from communicable and infectious disease and able to participate in a group program? YES ___ NO ___

GENERAL HEALTH ____________________________

IMMUNIZATION RECORD-PLEASE GIVE DATES FOR THE FOLLOWING (Minimum requirements for entrance are listed on the back of this form):

DPT/DT 1_____ 2_____ 3_____ B_____ B_____

POLIO 1_____ 2_____ 3_____ B_____ B_____

MMR 1_______ B_______ TB SKIN TEST _____ RESULTS _____

HibCV 1_____ 2_____ 3_____ 4_____

Are any additional immunizations needed? _____ If yes, when will they be given? ________ If immunizations cannot be given, explain: __________

____

Is this child able to participate in normal outdoor physical activity? ________
If no, explain: ____________________________

Special instructions, if any: ____________________________
____

____________________ ____________
Physician's Signature Date

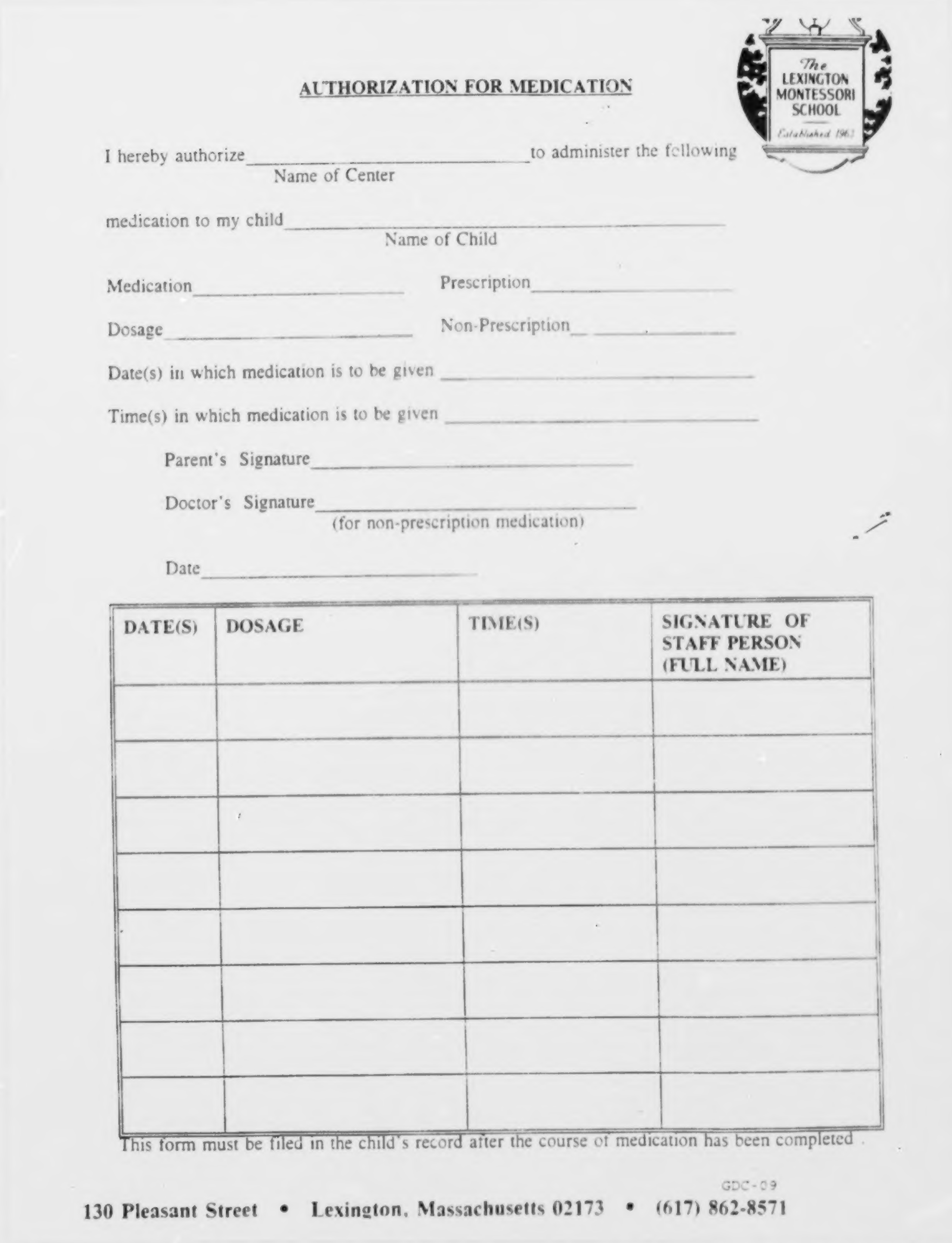
ADDRESS ________________________________

PHONE ________________________________

3993 W. NORTHWEST HIGHWAY • DALLAS, TEXAS 75220 • (214) 351-6404

Lakemont's health form is to be completed by the child's physician. State and local regulations may require certain immunizations before the child can enter school.

Authorization for Medication, Lexington Montessori School (Lexington, MA)



The
LEXINGTON
MONTESSORI
SCHOOL
Established 1963

AUTHORIZATION FOR MEDICATION

I hereby authorize ______________________ to administer the following
Name of Center

medication to my child ______________________________
Name of Child

Medication ________________ Prescription ________________

Dosage ________________ Non-Prescription __ ____________

Date(s) in which medication is to be given ____________________

Time(s) in which medication is to be given ____________________

Parent's Signature ____________________

Doctor's Signature ____________________
(for non-prescription medication)

Date ________________

DATE(S)	DOSAGE	TIME(S)	SIGNATURE OF STAFF PERSON (FULL NAME)

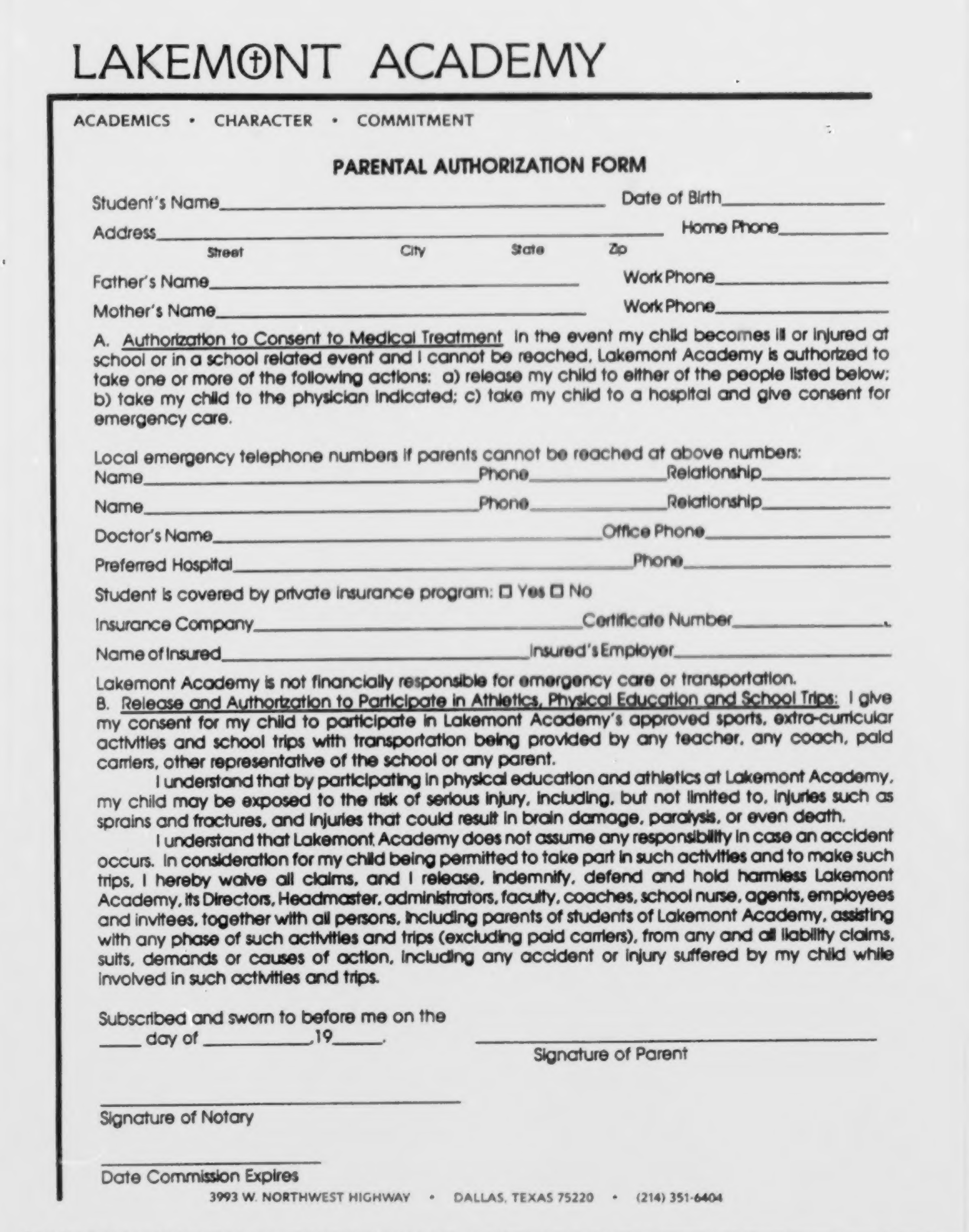
This form must be filed in the child's record after the course of medication has been completed.

GDC-09

130 Pleasant Street • Lexington, Massachusetts 02173 • (617) 862-8571

Parents must give written permission for staff to administer medication. Lexington uses an authorization form, on which a staff member notes each instance when medication is given. The form is filed with the child's records. Medication may not be kept in the child's possession while at school; it is stored in a secure place accessible only to adults. See Chapter 10 for more information on health and medication policies.

Emergency Care Authorization, Lakemont Academy (Dallas, TX)



LAKEMONT ACADEMY

ACADEMICS • CHARACTER • COMMITMENT

PARENTAL AUTHORIZATION FORM

Student's Name________________ Date of Birth__________

Address________________ Home Phone__________

Street City State Zip

Father's Name________________ Work Phone__________

Mother's Name________________ Work Phone__________

A. Authorization to Consent to Medical Treatment In the event my child becomes ill or injured at school or in a school related event and I cannot be reached, Lakemont Academy is authorized to take one or more of the following actions: a) release my child to either of the people listed below; b) take my child to the physician indicated; c) take my child to a hospital and give consent for emergency care.

Local emergency telephone numbers if parents cannot be reached at above numbers:

Name________________ Phone__________ Relationship__________

Name________________ Phone__________ Relationship__________

Doctor's Name________________ Office Phone__________

Preferred Hospital________________ Phone__________

Student is covered by private insurance program: ☐ Yes ☐ No

Insurance Company________________ Certificate Number__________.

Name of Insured________________ Insured's Employer__________

Lakemont Academy is not financially responsible for emergency care or transportation.

B. Release and Authorization to Participate in Athletics, Physical Education and School Trips: I give my consent for my child to participate in Lakemont Academy's approved sports, extra-curricular activities and school trips with transportation being provided by any teacher, any coach, paid carriers, other representative of the school or any parent.

I understand that by participating in physical education and athletics at Lakemont Academy, my child may be exposed to the risk of serious injury, including, but not limited to, injuries such as sprains and fractures, and injuries that could result in brain damage, paralysis, or even death.

I understand that Lakemont Academy does not assume any responsibility in case an accident occurs. In consideration for my child being permitted to take part in such activities and to make such trips, I hereby waive all claims, and I release, indemnify, defend and hold harmless Lakemont Academy, its Directors, Headmaster, administrators, faculty, coaches, school nurse, agents, employees and invitees, together with all persons, including parents of students of Lakemont Academy, assisting with any phase of such activities and trips (excluding paid carriers), from any and all liability claims, suits, demands or causes of action, including any accident or injury suffered by my child while involved in such activities and trips.

Subscribed and sworn to before me on the
____ day of __________, 19____.

____
Signature of Parent

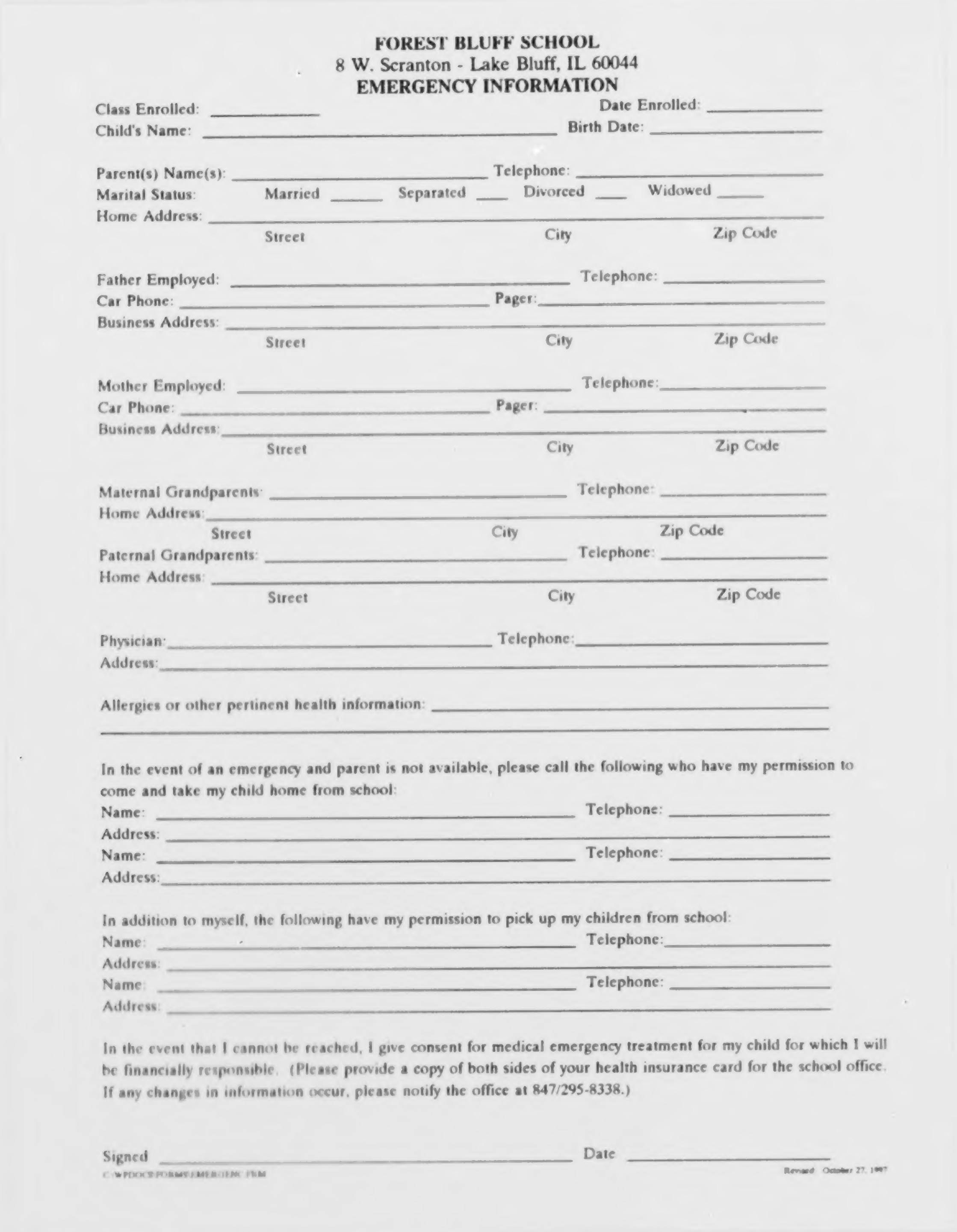
____
Signature of Notary

____
Date Commission Expires

3993 W. NORTHWEST HIGHWAY • DALLAS, TEXAS 75220 • (214) 351-6404

This form records emergency contact information, authorizes emergency medical treatment, and grants permission for the student's participation in sports, trips, and other activities, while clearly defining the limits of the school's liability. When students engage in activities off-site, it is good practice for a staff member to carry the emergency contact/authorization forms as an extra precaution.

Child Release and Emergency Form, Forest Bluff School (Lake Bluff, IL)



FOREST BLUFF SCHOOL
8 W. Scranton - Lake Bluff, IL 60044
EMERGENCY INFORMATION

Class Enrolled: ____________ Date Enrolled: ____________
Child's Name: ______________________________ Birth Date: ______________

Parent(s) Name(s): ______________________ Telephone: ______________
Marital Status: Married _____ Separated ___ Divorced ___ Widowed _____
Home Address: ____
Street City Zip Code

Father Employed: ______________________ Telephone: ______________
Car Phone: ______________________ Pager: ______________
Business Address: ____
Street City Zip Code

Mother Employed: ______________________ Telephone: ______________
Car Phone: ______________________ Pager: ______________
Business Address: ____
Street City Zip Code

Maternal Grandparents: ______________________ Telephone: ______________
Home Address: ____
Street City Zip Code
Paternal Grandparents: ______________________ Telephone: ______________
Home Address: ____
Street City Zip Code

Physician: ______________________ Telephone: ______________
Address: ____

Allergies or other pertinent health information: ______________________
____

In the event of an emergency and parent is not available, please call the following who have my permission to come and take my child home from school:
Name: ______________________ Telephone: ______________
Address: ____
Name: ______________________ Telephone: ______________
Address: ____

In addition to myself, the following have my permission to pick up my children from school:
Name: ______________________ Telephone: ______________
Address: ____
Name: ______________________ Telephone: ______________
Address: ____

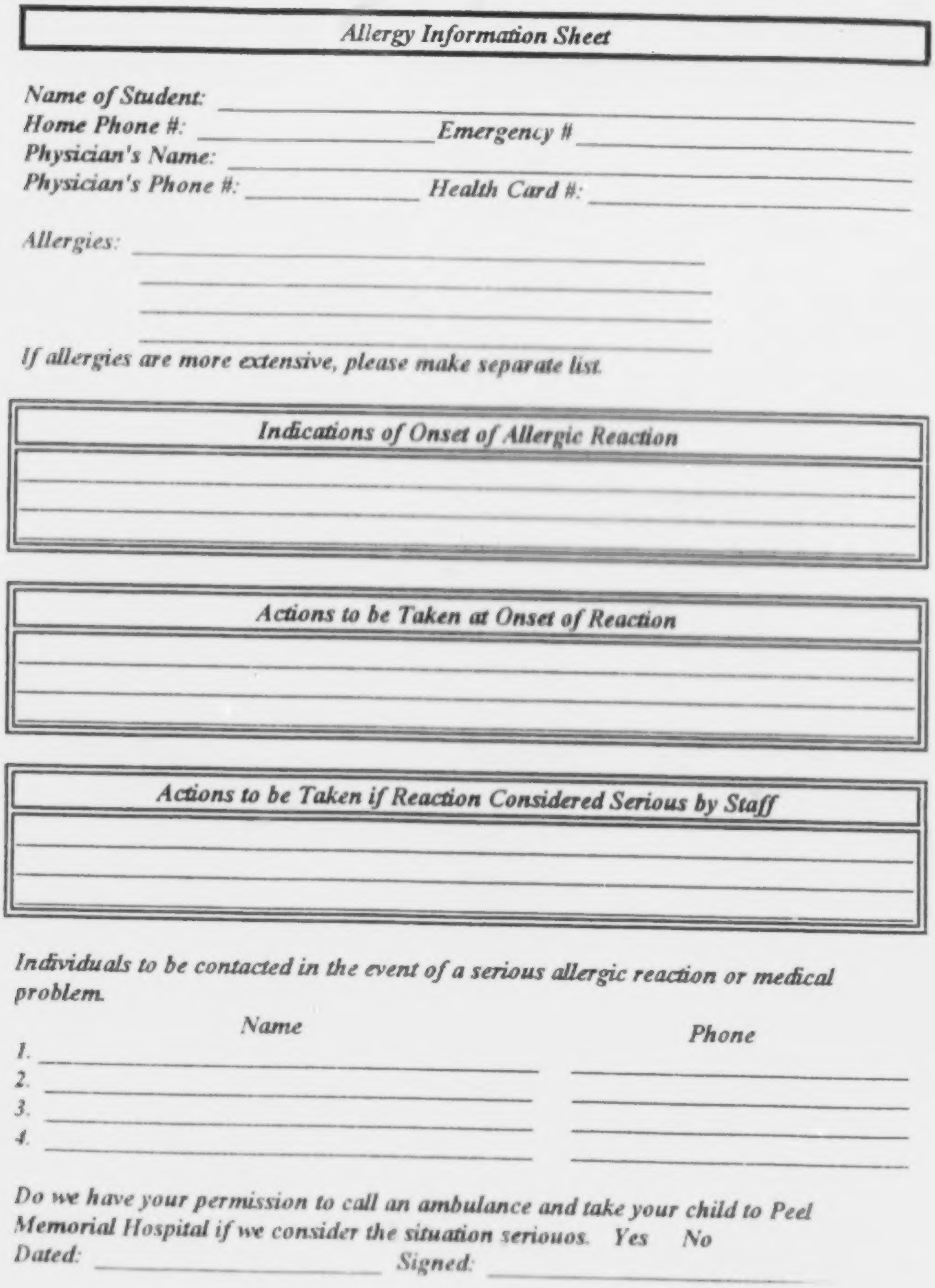
In the event that I cannot be reached, I give consent for medical emergency treatment for my child for which I will be financially responsible. (Please provide a copy of both sides of your health insurance card for the school office. If any changes in information occur, please notify the office at 847/295-8338.)

Signed ______________________________ Date ______________

Revised October 27, 1997

This concise form covers emergency contacts, authorization to pick the child up, and authorization for emergency medical care.

Allergy Information, Tall Pines School (Brampton, Ontario)



Allergy Information Sheet

Name of Student: ______________________

Home Phone #: ______________ *Emergency #* ______________

Physician's Name: ______________________

Physician's Phone #: ______________ *Health Card #:* ______________

Allergies: ______________________

If allergies are more extensive, please make separate list.

Indications of Onset of Allergic Reaction

Actions to be Taken at Onset of Reaction

Actions to be Taken if Reaction Considered Serious by Staff

Individuals to be contacted in the event of a serious allergic reaction or medical problem.

	Name	*Phone*
1.		
2.		
3.		
4.		

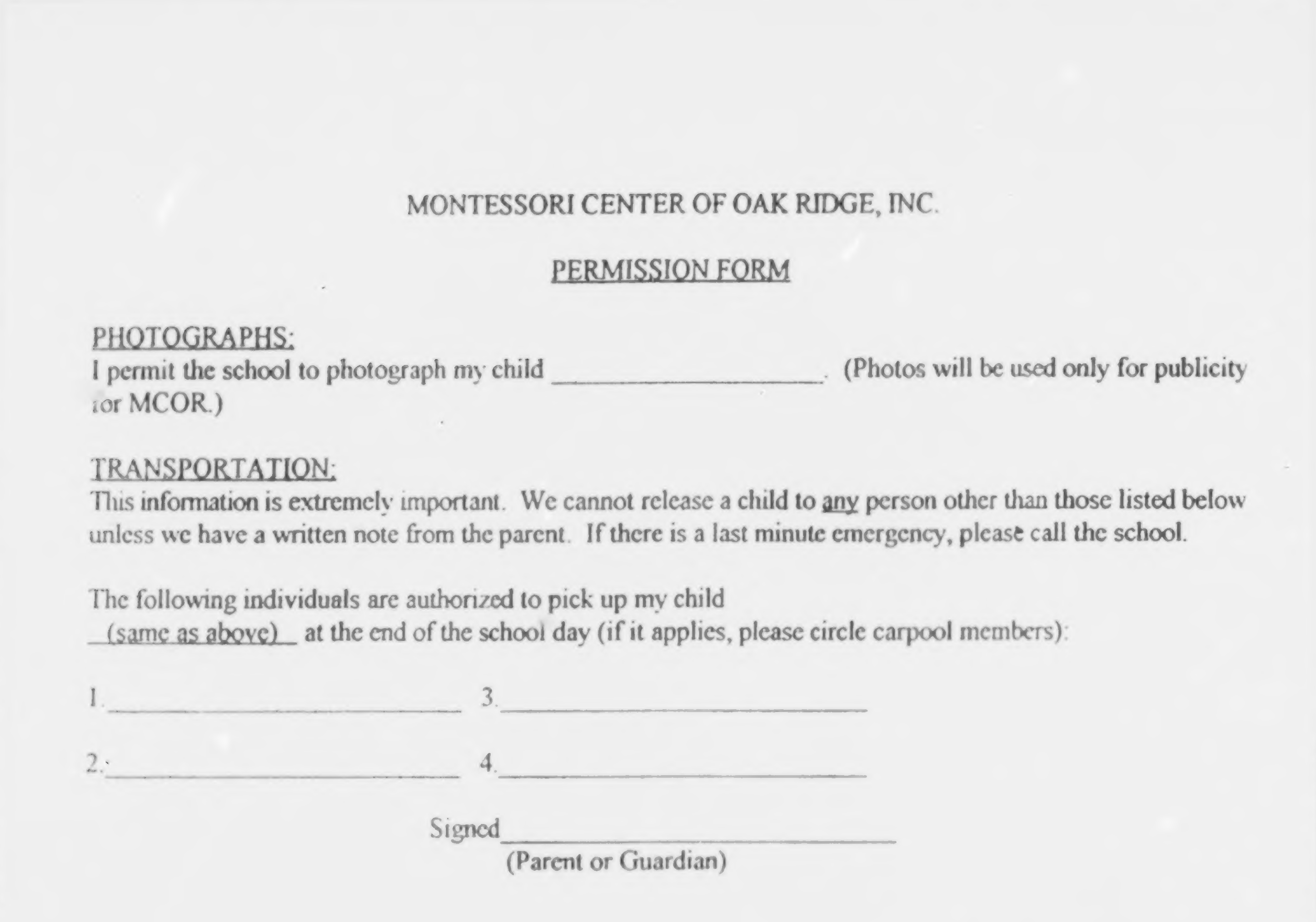
Do we have your permission to call an ambulance and take your child to Peel Memorial Hospital if we consider the situation seriouos. Yes No

Dated: ______________ *Signed:* ______________

Tall Pines uses a separate form for detailed allergy information.

Permission Form, Montessori Center of Oak Ridge (Oak Ridge, TN)

This form grants permission for photographs as well as providing child release authorization



MONTESSORI CENTER OF OAK RIDGE, INC.

PERMISSION FORM

PHOTOGRAPHS:

I permit the school to photograph my child ____________________. (Photos will be used only for publicity for MCOR.)

TRANSPORTATION:

This information is extremely important. We cannot release a child to any person other than those listed below unless we have a written note from the parent. If there is a last minute emergency, please call the school.

The following individuals are authorized to pick up my child (same as above) at the end of the school day (if it applies, please circle carpool members):

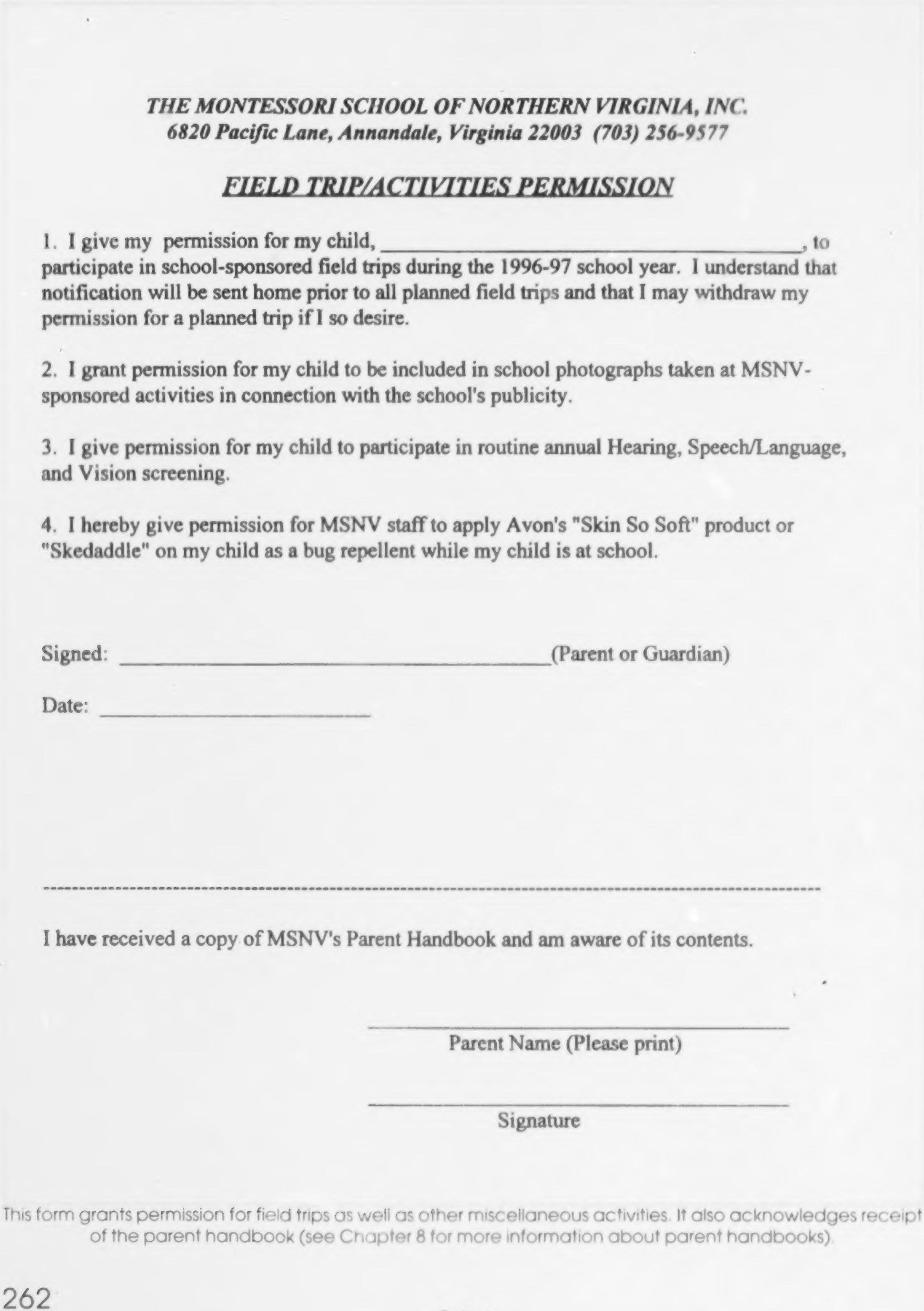
1. ____________________ 3. ____________________

2. ____________________ 4. ____________________

Signed ____________________

(Parent or Guardian)

Permission Form, Montessori School of Northern Virginia (Annandale, VA)



THE MONTESSORI SCHOOL OF NORTHERN VIRGINIA, INC.
6820 Pacific Lane, Annandale, Virginia 22003 (703) 256-9577

FIELD TRIP/ACTIVITIES PERMISSION

1. I give my permission for my child, ______________________________________, to participate in school-sponsored field trips during the 1996-97 school year. I understand that notification will be sent home prior to all planned field trips and that I may withdraw my permission for a planned trip if I so desire.

2. I grant permission for my child to be included in school photographs taken at MSNV-sponsored activities in connection with the school's publicity.

3. I give permission for my child to participate in routine annual Hearing, Speech/Language, and Vision screening.

4. I hereby give permission for MSNV staff to apply Avon's "Skin So Soft" product or "Skedaddle" on my child as a bug repellent while my child is at school.

Signed: ______________________________________(Parent or Guardian)

Date: ________________________

- -

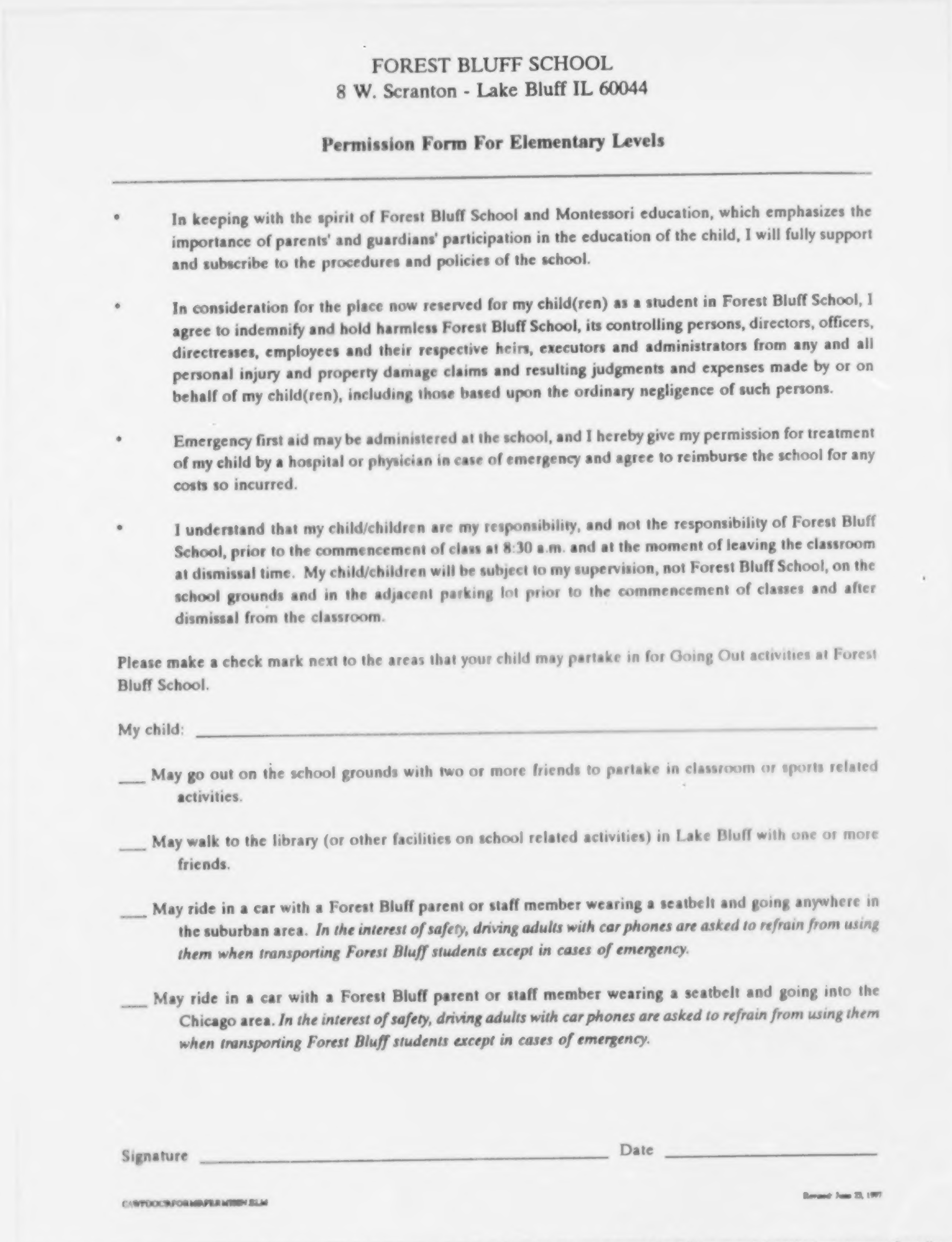
I have received a copy of MSNV's Parent Handbook and am aware of its contents.

____
Parent Name (Please print)

____
Signature

This form grants permission for field trips as well as other miscellaneous activities. It also acknowledges receipt of the parent handbook (see Chapter 8 for more information about parent handbooks).

Permission Form, Forest Bluff School (Lake Bluff, IL)



FOREST BLUFF SCHOOL
8 W. Scranton - Lake Bluff IL 60044

Permission Form For Elementary Levels

- In keeping with the spirit of Forest Bluff School and Montessori education, which emphasizes the importance of parents' and guardians' participation in the education of the child, I will fully support and subscribe to the procedures and policies of the school.
- In consideration for the place now reserved for my child(ren) as a student in Forest Bluff School, I agree to indemnify and hold harmless Forest Bluff School, its controlling persons, directors, officers, directresses, employees and their respective heirs, executors and administrators from any and all personal injury and property damage claims and resulting judgments and expenses made by or on behalf of my child(ren), including those based upon the ordinary negligence of such persons.
- Emergency first aid may be administered at the school, and I hereby give my permission for treatment of my child by a hospital or physician in case of emergency and agree to reimburse the school for any costs so incurred.
- I understand that my child/children are my responsibility, and not the responsibility of Forest Bluff School, prior to the commencement of class at 8:30 a.m. and at the moment of leaving the classroom at dismissal time. My child/children will be subject to my supervision, not Forest Bluff School, on the school grounds and in the adjacent parking lot prior to the commencement of classes and after dismissal from the classroom.

Please make a check mark next to the areas that your child may partake in for Going Out activities at Forest Bluff School.

My child: ____________________

___ May go out on the school grounds with two or more friends to partake in classroom or sports related activities.

___ May walk to the library (or other facilities on school related activities) in Lake Bluff with one or more friends.

___ May ride in a car with a Forest Bluff parent or staff member wearing a seatbelt and going anywhere in the suburban area. *In the interest of safety, driving adults with car phones are asked to refrain from using them when transporting Forest Bluff students except in cases of emergency.*

___ May ride in a car with a Forest Bluff parent or staff member wearing a seatbelt and going into the Chicago area. *In the interest of safety, driving adults with car phones are asked to refrain from using them when transporting Forest Bluff students except in cases of emergency.*

Signature ____________________ Date ____________________

[illegible]

Revised: June 23, 1997

This form covers parent commitment, emergency medical care, school liability, and field trips, specifically incorporating the special circumstances of a Montessori elementary "going-out" program.

Parent Involvement and Guidelines

Introduction: Creating Partnerships with Parents

Parents are the child's first and most important educators. Montessori schools emphasize the importance of the family in the child's development and seek to create a partnership with parents. Such a partnership is a two-way, interactive process.

The child's fullest development demands involvement of both the family and the school. The parents and school engage in an ongoing dialogue centered on the needs of the child. Parents grow and learn along with their child–and the school grows through its collaboration with parents.

Parent partnership goes beyond parent education. Parents cannot just be passive recipients of teaching by the school but must evolve into active teachers and contributors in turn. Together, staff, parents, and children become a community of learners, able and willing to receive and to give back.

New Parent/Child Orientation

The orientation of new families begins with the admissions process and continues as these new families come into the school community. Montessori schools must be sensitive to the special needs and anxieties of new children and parents as they approach the first days of school.

Parent Handbook

Between the acceptance letter and the first day of school, parents receive an information packet, usually in the mail, containing such items as supply lists for each class, faculty and family rosters, a special events calendar for the year, notice of any beginning-of-the-year schoolwide or class social events, the first newsletter of the year, orientation procedures, etc. Sometimes this mailing includes the first tuition payment invoice. This is also the time that many schools distribute a parent handbook, which provides orientation to a range of matters from history of the school and discipline philosophy to the "nuts and bolts" questions of daily schedule, appropriate dress, administering medication, etc. Some topics typically addressed in the parent handbook include the following:

Some schools cover some of these topics in the staff handbook; see Chapter 10.

School History and Programs

Some schools include information on their history, organizational structure, affiliation or accreditation, and a brief description of programs offered.

Admissions Procedures

When making an initial inquiry about the school, some parents request a copy of the parent handbook so that they can see all school policies and procedures. Therefore, some schools include admissions procedures in the handbook instead of making them a separate handout (see the samples in Chapter 7). Many schools reiterate in the handbook their nondiscrimination policy (usually also found in the school brochure).

See Chapter 2 for information on Internal Revenue Service procedures related to nondiscriminatory admissions.

School Directory

Some handbooks list names and addresses of parents and faculty; some even include class rosters. Some also contain brief faculty biographies.

Contact Information

All contact information, including school phone and fax numbers, school hours, office hours, etc., should be readily accessible in the handbook.

Emergency Procedures

Procedures for family emergencies and at-school illnesses and accidents should be easy to locate.

Parent Involvement

Most handbooks include information on the school's parent association, volunteer opportunities and obligations, parent education events, parent-teacher conferences, etc.

Supplies and Belongings

Include lists of supplies to be brought from home for each age level. Some handbooks give instructions for marking children's belongings and policies on bringing toys or other belongings to school.

Dress Code or Appropriate Clothing

Montessori school dress codes range from required uniforms to simple suggestions for clothing that encourages movement and independence. Schools that serve older children and teenagers often state a policy prohibiting explicit or offensive clothing; sometimes jewelry and/or makeup are regulated.

Parties, Birthdays, etc.

Many handbooks include policies or suggestions pertaining to parties, birthdays, Valentines, etc. Some schools, for instance, discourage out-of-school parties or at least prohibit distribution of party invitations at school. Some suggest nutritious birthday treats parents might send for the class to share. Others encourage parents to donate a book or other item to the class in honor of a child's birthday.

Nutrition

Some handbooks give nutrition guidelines for lunches or snacks brought to school.

Arrival, Dismissal, Parking

Most handbooks spell out arrival and dismissal procedures as well as parking policies, often with a map showing designated pickup, drop-off, and parking areas. Some, usually as a liability insurance requirement, make it clear that the parent is legally responsible for the child before and after normal school hours, even when the child is in the school parking lot.

Field Trips or "Going Out"

Policies, guidelines, and information might include permission slips, transportation, fees, and, for elementary students, the Montessori "going out" philosophy.

Safety and Security

Spell out any security procedures visitors to the school must follow, as well as any safety rules. Some handbooks include very specific playground safety rules. Information on fire, tornado, or other disaster drills might also appear in the handbook.

See Chapter 10 for a discussion of safety and security policies from the faculty/staff point of view.

School Closing

Include the school's policy on snow days or other weather-related closing, specifying how the closing information will be disseminated (particular radio/television stations, phone tree, etc.). Most handbooks encourage parents *not* to call the school for closing information.

Outdoors Policy

Most handbooks state that the outdoors is an important part of the prepared environment and that children will usually go outside every day. Schools in colder climates sometimes indicate a cutoff temperature or wind-chill factor. Some handbooks specify that a child too ill to go outside must remain at home.

Health and Wellness Policies

The handbook should include policies and guidelines on illness, specifying when to keep a child home, as in this excerpt from the parent handbook of the Montessori School of Northern Virginia (Annandale, VA):

> If you notice a change in your child's behavior, such as feeling tired or out-of-sorts, consider this a sign of the onset of illness, which is the most contagious time. Keep your child home for some extra rest if he or she is overly tired or irritable.
>
> Children with communicable diseases (including serious colds, sore throats, persistent cough, rash, conjunctivitis and the like) or who have vomited or had diarrhea or had a fever over 100 degrees in the 24 hours preceding the school day ***must be kept at home.*** If your child has had a throat culture, please keep him or her at home until the results have been reported to you—even if your doctor says it is all right to send the child to school. A child who is prescribed an antibiotic must be on the medication for 24 hours before returning to school. ... Please inform the office of any illness or contagious diseases immediately.

Students should never be allowed to self-medicate at school. The parent handbook should specify that medications must be handed directly to a staff member by the parent and must be in the original container and accompanied by a form giving the parent's permission to administer the medication as well as all instructions (see sample forms in Chapter 7). Some states and localities have laws governing dispensing of medication at school.

See Chapter 10 for more information on medication policies.

Some handbooks also include information on state and local immunization requirements, and a few specify procedures for medical appointments during school hours.

Financial Policies

Policies to specify in the handbook include tuition payment plans, refunds, returned checks, late payments, etc. Any policies that exclude students or withhold records due to delinquent tuition payments should be published in the parent handbook, brochure, or catalog.

Attendance Policy

Most handbooks communicate an expectation that children will miss school only when illness requires them to stay at home. Schools with a middle school or high school program may have a stronger attendance policy.

Discipline Policy, Code of Conduct

Although the word *discipline* is used in Montessori to refer to the spontaneous *self*-discipline of the child, many parent handbooks include a section on expected behavior under the heading of "discipline policy" or "code of conduct," often specifying consequences for disruptive behavior (see also Dismissal, Suspension, and Referral, below). The following excerpt appears under the heading "Discipline" in the parent handbook of the Montessori School of Raleigh (Raleigh, NC):

See Chapter 10 for more information on discipline policies.

> The Montessori program nurtures self-discipline, which develops over a period of many years. The basis of discipline is respect: respect for oneself, for others, and for the

environment. The adults and children in the prepared environment set limits for behavior based on the group's need for a safe and mutually respectful community.

If a student has difficulty following the rules of the community, the response will be age-appropriate. Personal attention, distraction, substitution and/or removal from the situation are typical approaches. Many instances resolve themselves as the student, within the bounds of safety and common sense, experiences the logical consequences of his/her actions (i.e., wiping up after throwing a paint can on the floor).

If the student disregards the rules of the classroom community, the Director/ress seeks the underlying causes in order to help the student understand the inappropriateness of his/her actions and to find a constructive alternative. If such behavior occurs repeatedly, the Director/ress may request the Executive Director and/or another classroom director/ress to observe and offer consultation before the parents are contacted for their support and cooperation. ...

The following are some general guidelines of Montessori discipline that parents should seek to apply at home as well as at School:

- "Hold the student to standard": s/he will rise to expectations
- Behavior: Think Satisfaction & Motivation vs. Gratification & Manipulation
- Separate the "Denial"/"Hurt"/ and "Suffering" of growing up from real deprivation
- Make Reward Internal, not External
- To maintain strong, effective discipline, seek consistency and clarity
- Catch children "doing something right"
- Engage, interest the student
- Involve, stimulate the student
- Redirect the child from destructive, negative behavior
- Be respectful. Maintain unconditional love. Love is not a "bargaining chip"!
- Use humor to support and defuse, not to deflate. Sarcasm bites and hurts.
- Let natural consequences flow from inappropriate behavior.

Dismissal, Suspension, Referral

Dismissal usually occurs by reason of tuition default, failure to provide required records, and/or poor attendance. Suspension is usually for repeated harm to property or to the physical safety of other children. Referral of the child is appropriate when it is clear that a multi-age, open-ended classroom is not the most suitable environment for that child.

Students can be expelled or suspended only with the protection of a published procedure that includes an appeal process. Expulsion requires cause, notice, and a review process. Because of their potential negative tone, policies on all these matters should be alluded to

Most schools treat suspension, expulsion, and referral policies in greater detail in the faculty handbook. See Chapter 10.

in the parent handbook, mentioning that the full policy is available on request in the school office.

Communication Channels, Parent Grievance Procedures, Conflict Resolution

Parents need to know exactly where to go to get information or voice concerns. The following communication channels chart from Northwoods Montessori School (Atlanta, GA) is a handy reference:

Matter Related to:	First Contact
child's progress	Classroom Teacher
classroom activities	
classroom assistant	
class procedures	
early morning arrival	Extended Day Teacher
Extended Day program	
Extended Day assistants	
Extended Day procedures	
pedagogical issues	Director of Education
academic policy	
admissions	
parent education	
school finances	Executive Director
facilities	
legal matters	
transportation	
fundraising	
daily scheduling	Director of Public Relations
student records	
observations	
registration	
public relations	
billing/accounts	Accounts Manager
changes in tuition	

A grievance or conflict resolution procedure should entail a tier process that begins with the person directly concerned, then moves to the head of school and then possibly to a board representative or outside facilitator. Here is an excerpt from the conflict resolution policy of Lakemont Academy (Dallas, TX):

> When problems arise, resolution should follow these steps:
>
> If you have a question regarding your child, ask his teacher. Teachers are your first resource to answer your questions and resolve your difficulties.
>
> If the teacher is unable to resolve the question, please address your question to the director of the Preschool.

> If a resolution cannot be reached in the above two steps, please set up an appointment regarding your situation with the Headmaster.
>
> We desire to do the very best for your child. When we handle areas of concern quickly and with care, we achieve our goals for your child without disruption.

Student Records

The handbook should spell out what student records consist of, what laws apply to confidentiality and access to student records, the statute of limitations for keeping records (usually 5-7 years), etc. Parents have a legal right to see any information that is forwarded to other schools unless they have waived their access to these materials. Such waivers are usually represented on formal requests for letters of reference (see Chapter 7). The Montessori School of Northern Virginia (Annandale, VA) offers the following student records policy:

> Student records may consist of, but are not limited to, attendance records, health and emergency information, assessments, developmental and academic progress reports, accident reports, and parental authorization for various school activities.
>
> ***Confidentiality of Student Records and Parental Rights:*** MSNV stresses the importance of protecting the rights and privacy of children, their families, and our teachers. The practice of maintaining the confidentiality of verbal information and written records is a basic policy of our school. This practice is in accord with one of the primary ethical principles of professional behavior in early childhood settings. For this reason, no parent volunteer working in the office is ever permitted any access to any records pertaining to a child or children other than the child or children of that volunteer.
>
> Legal parents and guardians have the right to inspect and review any and all records, files and data directly related to their children. Parents/guardians who desire to review these records are requested to call the Head to schedule an appointment to do so. A MSNV Staff member must be present whenever records are reviewed.
>
> ***Maintenance of Records of Previously Enrolled Children:*** Records of a child who has been previously enrolled at MSNV will be kept on file for 5 years after s/he has left the school. Upon receipt of a written request for these records that is signed by the child's legal parent/guardian, copies of these records may be released to the Administrator of the school at which the child is (or will be) enrolled.

Custody

Since divorce is a reality in many children's lives, the school may wish to state policies regarding where school notices are sent, who conducts parent conferences, who is responsible for tuition, etc. Here is one example, from the Montessori School of Lake Forest (Lake Forest, IL):

> In cases of separation or divorce where one parent or guardian has custody of the children, the School sometimes receives special requests or instructions regarding the children. In order to clarify the legal regulations and to prevent any misunderstanding, the following information is offered. While most parents are aware of the appropriate rules and regulations in this matter, it has been our experience that some parents have not been informed as to the rights of non-custodial parents.

According to Public Law 93-380, the Family Educational Rights and Privacy Act (FERPA) and Illinois Public Act 85-1389:

"In the case of divorce or separation, a school district must provide equal access to both natural parents, custodial and non-custodial, unless there is a legal binding document that specifically removes that parent's FERPA rights."

In this context, a legally binding document is a certified court order or other legal paper that prohibits access to education records, or removes the parent's right to have knowledge about his or her child's records. A certified court order would also be required if restrictions were placed on when and where a parent might contact or visit the child at school.

This information is provided because parents often give special information regarding their child's custody which the Montessori School of Lake Forest cannot utilize legally. A handwritten note, a telephone call or comments on the registration card are not in accordance with the law. The school must have a copy of a certified court order noting any restrictions. These are kept in the student's folder. Should you have any further questions, please contact the office at your convenience. Any legal action or information regarding court orders may require the assistance of your attorney or the courts.

Child Abuse Reporting

See Chapter 10 for a discussion of how staff should handle suspected child abuse.

Schools generally have no choice about whether or not to report suspected child abuse; they are legally bound to do so. Most handbooks cite applicable state or local law.

Other Policies

Schools with elementary programs often include in their parent handbook policies or suggestions on homework, standardized testing, computers, placement, etc. Some handbooks offer guidance on parenting matters: television, video games, reading at home, bedtime, nutrition, etc.

Some parent handbooks include policies on matters such as harassment (sexual or other) or HIV/AIDS (nondiscrimination, bodily fluids handling, etc.), but most schools cover these topics in the faculty handbook (see Chapter 10). When in doubt, consult an attorney.

The handbook is both an orientation tool and a handy reference for parents (see parent handbook table of contents from Lake Country School in this chapter's Sample Documents). Clear and sensible policy statements can also provide some protection against possible litigation.

New Parent Orientation

New parents need to be oriented to the school community and to their child's classroom. Assigning "parent buddies" is one effective way to initiate social interaction with another school family prior to the start of school. Parents are often more comfortable asking questions of another parent, and experienced parents can encourage involvement of new families through personal invitations. New parents can also participate in informal work sessions that provide opportunities to learn more about the class environment and to expand social contacts with other parents.

ORIENTATION FOR PARENTS OF THREE-YEAR-OLDS

Readiness

1. Academic readiness is really not the issue. Your child is not on trial. Whether your child can count, identify colors, use scissors properly, etc. is not the focus. The teacher is interested in the whole child, the child's ability to communicate and cooperate, and, most important, the child's willingness to accept and master new experiences. Based on this approach, it is important not to push skills on the child to make him or her ready. "You must learn your colors or you will not know what to do in school" is an anxiety-producing statement. Avoid connecting home discipline matters with what will happen at school.
2. Your child is coming to this school because you have perceived readiness. Perhaps it's because your child has exhausted his or her toys or seems bored, or you need a break—maybe your child has already had some experiences away from you, and these have been positive. Also, readiness has been determined by our preschool team. They have observed separation. They have interviewed your child. *Your child is ready. Everyone agrees.*

Going to School: Immediate Challenges

You have chosen this school to widen your child's social and academic exposure. Here are some skills your child will be developing right away:

1. Keeping track of belongings. (School provides specific storage areas. You keep track of your child's keeping track of clothes, shoes, etc.)
2. Understanding order. (Putting things back, having to take turns. You can encourage the same habits at home by spending time with your child when things are being put away.)
3. Doing things for oneself. (Zipping, buttoning, etc., are skills that will come out of the necessity of taking care of oneself in a classroom setting. Parents do not have to push. Children will want these skills as they see older children having them.)
4. Sharing an adult. (Child realizes he or she can't have the undivided attention of an adult.)
5. Inner controls related to environment. (Child must learn to observe the limits of the environment and the community because he or she wants to belong.)
6. Development of language. (New feelings and experiences will eventually broaden your child's range of expression.)
7. Desire to work. (Children experience a strong drive to improve themselves in relation to the school community.)

What Are Your Feelings?

1. Will the school accept and like our family? (Variety is the spice of life, and the school is geared to individual and family differences.)
2. We feel a great loss. Sending our child to school, we lose closeness, control, and intimacy. (It's all right to rely on others to aid in your child's development, not forgetting that you are the ultimate educator.)
3. My child and I anticipate a great adventure. (It's fun to try something new!) It may be as if your child is saying, "You will miss me more than I'll miss you, because you're in the middle of life and I'm at the beginning." It is important to focus on the feeling of adventure and downplay the feeling of loss. Many times the adult feels the loss; the child sees school as the "dawn of a new day!"

Some Handy Responses

- Child: "I want you to come into my school with me." Parent: "This school is for children just like you, not for grown-ups."
- Child: "The playground was really scary." Parent: "Yes, it is sometimes a bit scary when things are new. Soon it won't be so scary when you get used to it."
- Don't over-discuss ahead of time. If there is an issue upon arrival don't be ambivalent. Don't give a choice.

What to Expect

1. Children cannot always express the wide range of feelings they have when starting school. When asked, they may say nothing or focus on one or two negative incidents. Parents should not always be literal about a child's stated experiences. Much more is happening.
2. Children feel that school is different and behave differently than at home. They are becoming civilized members of a small community, and this entails great effort—sometimes stress—when first adjusting. Therefore, children need sensitive listening when they come home from school and a chance to "let down." They may be overtired, but too stimulated to nap.
3. In Montessori, children are not thrown into individual learning situations initially. They learn presentations through a group situation. They learn "grace and courtesy." They learn basic practical life exercises (pouring, putting chairs away, carrying, etc.) so that their concentration and coordination can build. Teachers will discuss these orientation approaches in meetings with individual parents. Everything leads toward academics, but we start with the child's basic community needs.

One of the most helpful orientation aids is a meeting of new parents with the classroom teacher before the start of school. Discussion focuses on orientation procedures, supplies, class social events, pertinent reiterations of the handbook information, and ways for families to work through a normal transition process. What is really most important about this meeting is that the teacher establishes a personal relationship with each new parent.

New Child Orientation

Orientation is needed in any new situation. The way in which orientation is facilitated for a new child will vary depending upon the child's age and stage of development. In all cases, it is helpful to schedule an informal visit for the child to see his or her class and to meet the teacher before the first day of school.

Anxiety is expected when change occurs. For young children–and their parents–separation anxiety is common. It may be reflected in a child's reluctance to come to school, possibly recurring after vacations, and should be dealt with sensitively, not regarded as abnormal. Sometimes a child's separation problem is a direct reflection of the parent's anxiety.

The orientation for new parents helps them to anticipate their own anxious feelings and provides practical suggestions to help their child separate from them during the transition of the first days. Simple guidelines for drop-off can help parents convey confidence and a positive attitude about school to the child.

Phasing in Young Children

Most schools provide a gradual orientation to the class for young children. Parents of infants and toddlers often attend with their child, especially during the early days.

Most schools have a phase-in calendar for new preschool children. New children and beginning three-year-olds may begin separately from returning four- and five-year-olds. By entering for short periods (usually one hour) in the morning over a five- to ten-day period and expanding in increments to a full three-hour morning session, the children have uninterrupted attention in a smaller and more secure setting. Some teachers prefer an afternoon orientation for new children, deferring the extended day (afternoon session for five-year-olds) until after the orientation period is over. Children are phased into the morning class as they are ready. Still other teachers phase three-year-olds into the full class a few at a time, over several weeks, without any separate orientation. Regardless of the orientation approach, it is important to involve the older children in concrete ways of helping and welcoming the youngest.

Phasing in Older Children

The anxiety of newly enrolled older children is primarily related to social adjustment rather than separation from parents. Orientation for these children involves immediate active participation with their peer group. A picnic or informal get-together for all the families in the class before the start of school facilitates introductions. Many elementary and adolescent classes plan expeditions, camping trips, or other community-building experiences during the first days to smooth social transitions for the new students.

First Conference and Home Visit

An orientation conference is essential. Parents are extremely concerned about their child's adjustment and are eager for information about his or her class activities. The first conference for parents of new children is scheduled two to three weeks after the start of school. The teacher and parents discuss the child's transition to the new class, including specific interests, successes, and difficulties.

Some teachers also plan a home visit for each new family to provide a complete picture of what makes up the child's life. Dinner time and bedtime are two of the most revealing interactions in a family's day, allowing the teacher to see how family relationships work. The child might like to give the teacher a tour of his or her bedroom. A home visit provides the teacher with an environmental understanding that creates a deeper bond with the whole family as well as a developmental perspective on the child.

Parent Development

Adults do not become mature parents all at once; they develop over time through intimate interaction with their child and with others in the family/community constellation. The family/school relationship assists parents in their development. This relationship must respect the uniqueness of families and recognize that parents are at differing stages of development.

Most new parents manifest a sensitive period where they are hungry for information about their child and his/her needs. They are open, vulnerable, and eager to attend meetings, to observe in the class, and to take in information that is immediately applicable to their child. The more experienced parent is less willing to be a passive recipient or to hear the same basic teacher presentations. These parents need opportunities to review principles in light of broader experience. They want to participate more actively and mutually in discussions about their children. Although no parent knows it all, every school has some mature parents who have had several children in the school across the program's continuum. They can further develop as parents through leadership, and they look for ways to make meaningful contributions beyond the interests of their own family.

Montessori schools view parent education as part of the larger goal of parent development through involvement. Schools design a variety of opportunities and experiences in order to respond to the needs of parents at different stages as well as the unique needs and interests of individual families. Parent involvement includes participation in educational, social, and financial aspects of the school community.

- Some events bring the whole school together. Examples include student productions, guest speakers, the annual fund drive, a fundraising auction, graduation.
- Some events are centered around individual class communities. Examples include beginning-of-year orientation, curriculum meetings, class socials, work bees, classroom observations.
- Some events are geared to specific interests or issues. Examples include study groups, planning committees, an alumni panel, volunteer activities.

Education Meetings

A number of meetings are planned each year to provide parents with specific information about child development, Montessori principles, and educational methods. Many of these are individual class meetings; others bring together parents from various classes or levels.

Overview for New Parents

A special meeting or series of meetings for parents new to the school explores key Montessori principles. This presentation and discussion examines the full scope of Montessori education and provides parents with a broad and exciting vision.

See this book's Introduction for a discussion of school stages of development.

The new parent meeting may start with an overview of the history of the school and how it came into being, stage by stage. Organize the school's story conceptually and include some good anecdotes and specific milestones. A brief talk on the planes of education and sensitive periods may provide the psychological basis for understanding multi-aged groups. End with ample time for parents to talk about their observation of stages of development and sensitive periods in their children. Other broad topics for new parents could include the meaning of character development, the role of the adult (both parents and teachers), the uses of the outdoors, the home environment, etc. Keep lectures no longer than twenty minutes; discussion is the key to real parent assimilation and understanding (see The Parent Discussion Group, below).

Curriculum Meetings

Parents want to know what their children do at school. Meetings designed to explore an aspect of the curriculum help parents to understand not only what their children are doing, but also why. Opportunities for hands-on exploration of materials enliven the teacher's presentation. Key anecdotes help parents to connect the material and methods with the specific behavior and responses of their children.

One way to engage parents in the curriculum is to lay out some of the Montessori materials for parents to explore and then have them discuss what they have discovered about the materials. Following the parents' discussion, the teacher can explain the materials' direct and indirect aims. Anecdotes about the class or particular children help keep the session lively and are a welcome variation from mere clinical description of the material. Many teachers record in their observations a funny story or observation that may have storytelling value.

If presentations are made, have the parent play the role of the child, which brings a high level of interest into the meeting, especially when the parent is then asked to do the work. Math is a very good area to begin with because of its concreteness and many layers of discovery and connections.

Another very effective way of exploring the curriculum is to examine one subject across the continuum, involving Montessori teachers from successive age levels. This type of presentation highlights the integration of the entire curriculum.

Audio-Visual Presentations

Another delightful way to help parents understand their child's school experience is through a slide or video show based on the life of their child's class. A teacher, parent, or older child can prepare the audio-visual material. It is important for the teacher to provide some commentary and to prepare several discussion points. Discussion is usually lively because the visual presentation is so personal.

Commercial audio-visual productions are also useful. Of particular interest are the NAMTA partner pieces, which include a brief video accompanied by a more in-depth booklet. Each video is about ten minutes, allowing time for plenty of discussion. The booklet is then distributed for parents to read after having seen the introductory video. There may be a follow-up meeting to discuss the booklet.

NAMTA has video and booklet partner pieces on a variety of topics: the home environment, the preschool program, the elementary program, and normalization. See the NAMTA catalog for current offerings.

Transition Meetings

Parents not only choose the school upon admission; parents also choose to continue their child in the school. This choice point is particularly acute as they anticipate their child's transition from one level to the next. Transition meetings allow parents to learn about the next level–to see how the Montessori principles are reflected in its curriculum and to understand how and why it differs from their child's current experience. They explore the classroom and talk with teachers and parents from the next level. Participation of the teacher from their child's current level underscores the continuity of their child's Montessori experience.

Guest Speakers

It is beneficial to include outside Montessori speakers in education meetings. They bring a fresh perspective to the Montessori vision that inspires parents and school staff.

In addition to Montessori speakers, other outside speakers can provide enrichment. A children's author or librarian, a naturalist who designs programs for children and families, a noted speaker on recent neuro-biological research–there are many guests who will add to parents' understanding of child development.

Schools often publicize these education events in the larger community. By opening these guest talks to the community, the school gains visibility as an educational organization interested in expanding awareness of child development issues.

Material-Making Meetings

Material-making meetings allow parents to learn by doing. During these informal work sessions, parents develop a deeper understanding of their child's use of Montessori materials and an appreciation for the many subtleties and extensions of the material. These meetings also permit parents to make a very tangible contribution to their child's class. Materials parents can make include card materials, practical life materials, etc.

The Parent Discussion Group

The main purpose of the parent discussion is to keep parents talking about their children. When parents are able to express their personal concerns about their children, describe their day with their children, and relate particulars to Montessori principles–then real processing can take place. Even if a Montessori book is the main focus, the discussion of the reading should point to particulars about what is happening in the home or classroom; the intent is not to make the parents literate Montessorians. Schools with infant/toddler programs sometimes offer prenatal classes. These groups involve parents from the school as well as others from the community.

Support in the discussion group from parent to parent is most significant. Even teachers can accrue wisdom from listening to parents advise other parents about specific needs. Therefore, the discussion group must elicit details about children. The teacher-leader must get parents to describe those parts of the day where challenges occur and then let the group comment before offering a professional opinion. Parents are experts about their own children.

The focus needs to be positive. Many parents have good memories to share about their childhood encounters with their parents–mealtime, bedtime, getting up in the morning, doing chores, etc. Storytelling about good memories is a positive way to warm up to a meeting that considers the home environment. The discussion might move from room to room, looking for ways to encourage activity and participation by children and adults in every room of the home.

The NAMTA publications *At Home with Montessori* and *A Child's Home Environment* are designed to fuel a discussion of the home environment. *The Normalized Child* by Kathleen Futrell is a practical and readable introduction to the Montessori concept of normalization. See the current NAMTA catalog for ordering information. *Punished by Rewards* by Alfie Kohn (Houghton Mifflin, 1993) is an excellent parent resource on the power of self-motivation. Order from your local bookstore.

Another positive approach is finding engagement in children's lives, looking at what makes children want to work independently, what makes them do spontaneous activities, what the basis is for long-term motivation. Parents need more than just theory; they can be shown what self-motivation and true engagement actually look like in young children and how to foster it.

Montessori parent education topics generally link together:

- What is the prepared environment and what is it designed to do?
- What is spontaneous discipline and what does it reveal about the child? How does it emerge in the prepared environment?
- What values contribute to the home environment?
- What is the role of language in development, and how can it be nurtured by both the home and the school environment?
- What dimension does the outdoor environment add to the creative choices of the prepared environment?
- What is creativity and how is it nurtured?

More information on topics for parent discussion meetings is found in the Sample Documents for this chapter.

Parent Observations

The best way for parents to understand their child's school experience is to observe in the classroom. Parents not only learn what their child is doing; they also see Montessori principles in action.

Parents need guidelines to help them see beyond their child's immediate behavior, which may be affected by their presence. It is recommended that parent observations be followed by a conference with the teacher within several weeks. Parents of children who will be transitioning to the next level are encouraged to observe a class at that level.

Parent/Child Open House

A class open house is very popular with both parents and children. Children invite their parents and give them a tour of the class, demonstrating their favorite activities. The teacher takes the role of observer, allowing the child to be the host. Open houses often end with the children presenting a song or skit for the parent guests.

Parent Conferences

Chapter 11 describes the use of parent conferences for student evaluation.

Parent/teacher conferences are more than a method of evaluating student progress. Conferencing is one of the most important ways to demonstrate and encourage a reciprocal parent/school partnership. Conferences are most effective when both teacher and parent expect to contribute and to learn (see this chapter's FYI article by Nancy Hildick).

Parent Lending Library

Some schools encourage parent development by maintaining a lending library of books on child development and other parent resources.

Written Communication with Parents

The most important public relations are internal. Parents need ongoing information that validates their choice of the Montessori school for their child. They need communication that affirms the core values shared by home and school. Parents also want to contribute their own voice in the ongoing dialogue.

Newsletters

A school newsletter is an excellent way to unite the entire community. Published bimonthly or quarterly, the newsletter traditionally features events in the current life of the school. Newsletters contain brief parent education articles, notice of upcoming events, and information on major developments at the school. The use of photos, children's artwork, and acknowledgement of special contributions enhances the sense of community. Many schools send their newsletters to alumni and community supporters.

In addition to the school newsletter, schools publish weekly bulletins to give updated information and to highlight current events in the community. Usually one page, bulletins are sent home the same day each week so that parents know to expect them.

Parents particularly enjoy the more personal "class news" from their child's class. Teachers are encouraged to write a short monthly class newsletter to briefly note activities of the class as a whole and of individual children. Regular features include notes about birthdays, new siblings, and other family events as well as thank-yous for volunteer efforts and contributions. Children at elementary and adolescent levels like to publish their own class news.

Annual Report

See Chapter 13 for more information on annual reports.

An annual report gives a bird's-eye view of the major developments of the school during the past year. Fundraising efforts are highlighted and names of all donors acknowledged. The annual report provides an encapsulated summary of the school year plus a shared feeling of accomplishment

Handouts

Handouts are often used to supplement parent meetings or to address issues or concerns of interest to parents. These articles are usually written by a teacher or the head of school. Occasionally, an article from another publication is reprinted with permission for distribution; some schools purchase prepared materials for parent handouts (see NAMTA's current catalog for parent literature offered).

Surveys

Exit surveys, completed when a family leaves the school, are helpful in assessing parents' views of the strengths and weaknesses of the school's program (see the attrition survey in this chapter's Sample Documents). A summary of survey data or a specific response to concerns or requests affirms that the school values parent input. It is important to hire an outside agency to do an exit survey in order to ensure candid responses; keep in mind that surveying parents who have chosen not to re-enroll will reveal some negative views.

Opportunities to Give

Parent Association

A parent association coordinates parent efforts in support of the school. In some cases, the association charges a membership fee of about ten to fifty dollars per person. Other associations consider all parents in the school to be members. The association elects officers, who coordinate its activities and provide accountability. One of the officers is generally delegated to provide liaison with the head of school or board president (see the parent association documents in this chapter's Sample Documents).

The activities of the parent association are usually concentrated in two areas: coordination of parent volunteers and fundraising. Some parent associations also organize schoolwide social events. The association must be careful to coordinate any fundraising efforts in accordance with the board's direction of fundraising priorities.

See Chapter 13 for more information on fundraising

Parent Volunteers

Volunteer opportunities allow parents to contribute to the school in tangible ways. The school expects parents to volunteer and organizes clear mechanisms to solicit and direct their efforts (see the volunteer survey in this chapter's Sample Documents). Each year, parents are asked to designate areas in which they can assist the school, such as driving for field trips, helping with cleanup and renovation, providing refreshments, or working on specific committees. In the absence of a parent association, a volunteer coordinator is often named to contact and organize parents according to their expressed interests.

Parent Ambassadors

Experienced parents are excellent ambassadors for the school. These parents become effective speakers for the school in the larger community and assist staff in hosting open houses and other community events.

Community Celebrations

Celebrations involving parents are integral to the life of the school. Many of these celebrations revolve around the activities of individual classes: holidays, simple plays, birthdays, farewells. Others bring the larger community together: a student opera production, teacher appreciation day, Earth Day cleanup, graduation. Whether small and informal or organized for the whole school, celebrations and rituals highlight and affirm the values and vision of the school.

Frequently Asked Questions

Should parents work in the classroom?

Some parents may be employed to assist the classroom teacher. It is best that the parent assistant not be placed in the same class with his or her child. Parent assistants are chosen for their willingness to be trained in Montessori principles, with the full understanding that their role is to assist the teacher and not to present Montessori lessons or materials. Parent assistants must be discreet about private classroom affairs and maintain confidentiality about all children and staff in the school.

Should parents be permitted to observe in the classroom whenever they want?

Schools generally ask parents to schedule an observation appointment in advance. This assures that only one or two guests are observing at a time and protects the classroom from constant interruption. However, parents should be assured that they are not prohibited from observing their child's class at any time. In many states, such open parent visitation is legally mandated. For security, all visitors should be instructed to check in first at the school office.

Parent observation is one of the most essential forms of parent education and should be actively encouraged by teachers. Most parents respect the school's request to schedule observations at specified times. A parent who demands frequent and unscheduled class visitation is usually insecure about his or her child's experience. After encouraging several observations, the teacher should follow up with a conference to discuss concerns or anxieties. If a parent's conduct is disruptive to the child or the class, the teacher should ask the parent to observe without disturbing the class. In rare cases, the teacher, with administrative support if necessary, may need to ask the parent to leave the class.

How can we increase parent participation in education meetings?

Most parents of newly enrolled children eagerly attend education meetings. Attendance of experienced parents, however, seems to diminish in many schools. Experienced parents may complain that they have already "heard all that." Teachers and the head of school must work together to design a variety of educational opportunities to meet the different needs and stages of parents. Advance preparation of an annual schoolwide parent education plan encourages program diversity and integration of staff.

Strive to make parent events interactive. Activity and feedback are important components in all learning. In particular, experienced parents need opportunities to actively contribute and even lead some parent education events. It is important to ask parents what they want in addition to providing what we think they need.

In our fast-paced modern society, a majority of parents work outside the home and face enormous time constraints. An annual calendar of parent education events encourages parents to choose among options and to schedule events into their own calendar. Many schools provide activities for the children during meetings, even inviting parents to share a simple meal with their child at school beforehand, in order to eliminate some logistical obstacles to parent involvement.

Further Reading from NAMTA

The following articles and documents are available as photocopies from NAMTA. See Appendix 4 for ordering information. In addition, see the current issue of the NAMTA Services Handbook (catalog) for booklets and audio-visual materials for parent education.

Battle, Judy Shepps. "Letting Go and Letting Montessori, Part II: Resolving Parental Resistance to Separation From Their Child." *The NAMTA Journal* 13.2 (1988, Spring): 113-128. 9 total pages.

Harrison, Barbara. "Parent Education: Defining the Needs." *The NAMTA Quarterly* 6.1 (1980, Fall): 8-9. 1 total pages.

Joosten, A. M. "Parents and Adults in the House of Children Unite Around the Child." *Around the Child* 8 (1963): 40-42. Reprinted in *The NAMTA Quarterly* 2.1 (1976, Fall): 1-3 (2). 2 total pages.

Kahn, David. "Herbert Ratner–Working with Parents." Interview with Herbert Ratner. *The NAMTA Quarterly* 2.1 (1976, Fall): 17-22. 4 total pages.

Kahn, David. "Of Roots and Wings." *The NAMTA Journal* 13.1 (1987-88, Fall/Winter): 1-12. 7 total pages.

Lopez, Antonia. "Constructing the Equilateral Triangle: Parents, Teachers, and Children." *The NAMTA Journal* 16.1 (1990-91, Fall-Winter): 78-93. 8 total pages.

McNamara, John. "Elementary Montessori and Parent Education." *The NAMTA Journal* 13.1 (1987-88, Fall/Winter): 25-33. 5 total pages.

Reed, Ruthanne, & Nancy Cannon. "The Value of Parent Study Groups." *The NAMTA Quarterly* 2.1 (1976, Fall): 23-25. 3 total pages.

Trochta, Charlene S. "Parent Education at Edwardsville [IL] Montessori School." *The NAMTA Quarterly* 2.1 (1976, Fall): 6-9. 2 total pages.

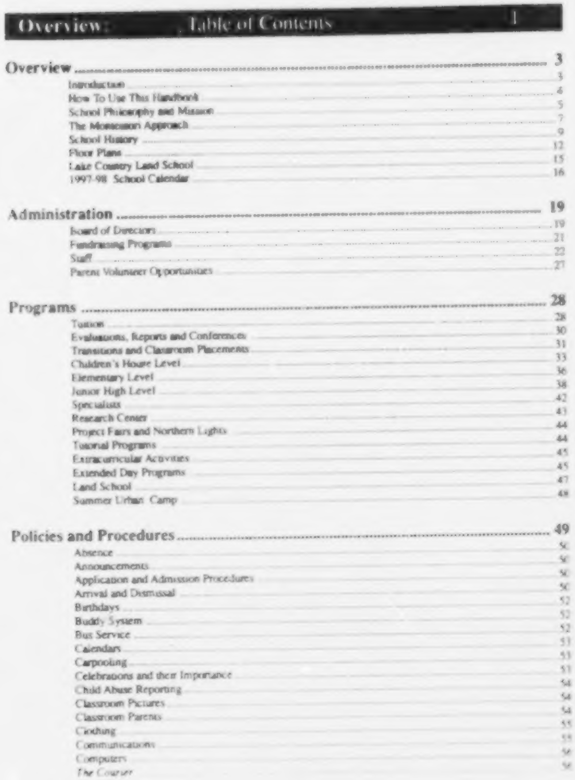
Weiss, Heather. "An Overview of the Harvard Family Research Project." *The NAMTA Journal* 12.2 (1987, Winter/Spring): 29-31. 2 total pages.

Sample Documents

The following documents illustrate common practices in Montessori school operations. To view documents at full size, photocopy and enlarge.

Parent Handbook Table of Contents, Lake Country School (Minneapolis, MN)

A well-written handbook provides orientation and procedural information for parents. This example includes a broad spectrum of information in a clearly organized format.



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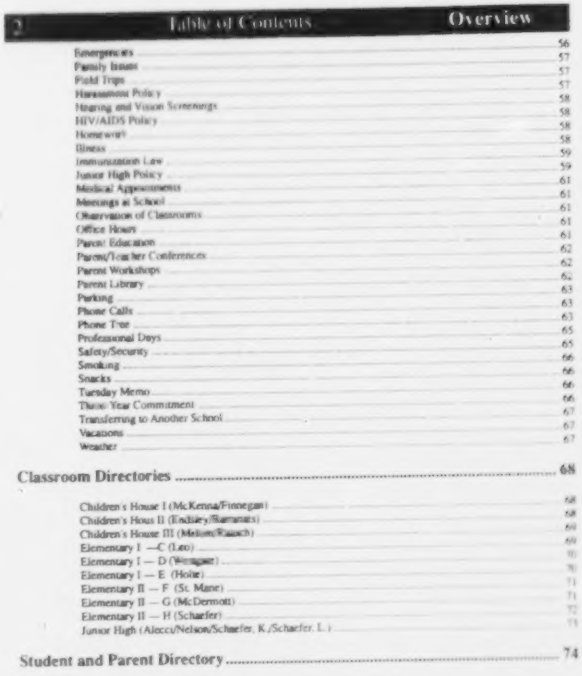

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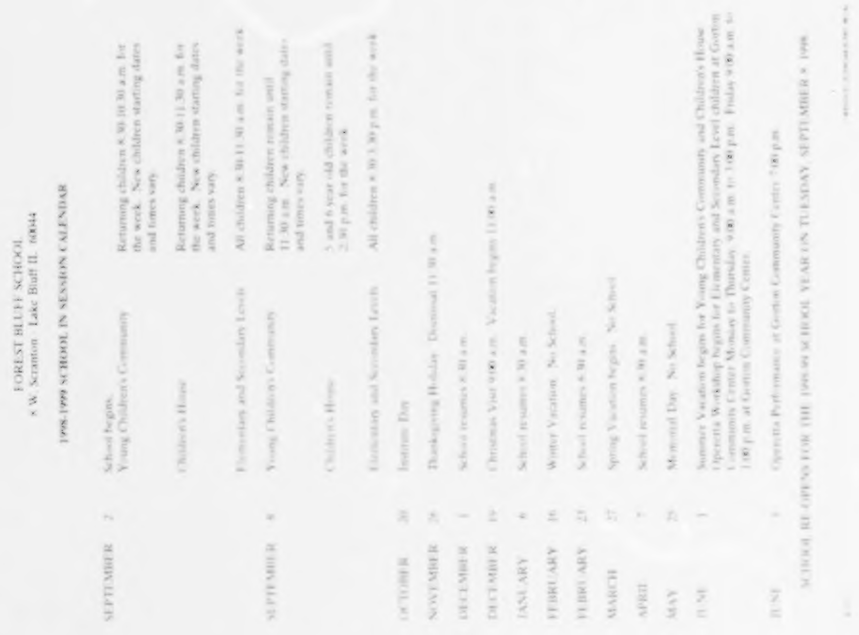
BEST COPY AVAILABLE

Calendars, Forest Bluff School (Lake Bluff, IL)

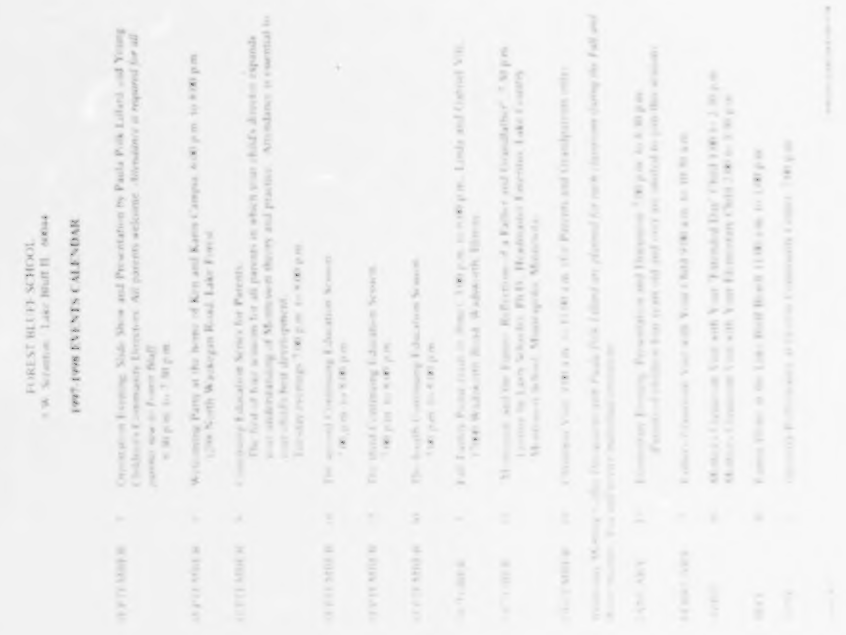


FOREST BLUFF SCHOOL
8 W. Scranton · Lake Bluff IL 60044

1998-1999 SCHOOL IN SESSION CALENDAR

SEPTEMBER	2	School begins. Young Children's Community	Returning children 8:30-10:30 a.m. for the week. New children starting dates and times vary.
		Children's House	Returning children 8:30-11:30 a.m. for the week. New children starting dates and times vary.
		Elementary and Secondary Levels	All children 8:30-11:30 a.m. for the week.
SEPTEMBER	8	Young Children's Community	Returning children remain until 11:30 a.m. New children starting dates and times vary.
		Children's House	5 and 6 year old children remain until 2:30 p.m. for the week.
		Elementary and Secondary Levels	All children 8:30-3:30 p.m. for the week.
OCTOBER	20	Institute Day	
NOVEMBER	26	Thanksgiving Holiday. Dismissal 11:30 a.m.	
DECEMBER	1	School resumes 8:30 a.m.	
DECEMBER	19	Christmas Visit 9:00 a.m. Vacation begins 11:00 a.m.	
JANUARY	6	School resumes 8:30 a.m.	
FEBRUARY	16	Winter Vacation. No School.	
FEBRUARY	23	School resumes 8:30 a.m.	
MARCH	27	Spring Vacation begins. No School.	
APRIL	7	School resumes 8:30 a.m.	
MAY	25	Memorial Day. No School.	
JUNE	1	Summer Vacation begins for Young Children's Community and Children's House. Operetta Workshop begins for Elementary and Secondary Level children at Gorton Community Center Monday to Thursday, 9:00 a.m. to 3:00 p.m. Friday 9:00 a.m. to 1:00 p.m. at Gorton Community Center.	
JUNE	5	Operetta Performance at Gorton Community Center 7:00 p.m.	

SCHOOL RE-OPENS FOR THE 1998-99 SCHOOL YEAR ON TUESDAY, SEPTEMBER 8, 1998.



FOREST BLUFF SCHOOL
8 W. Scranton · Lake Bluff IL 60044

1997-1998 EVENTS CALENDAR

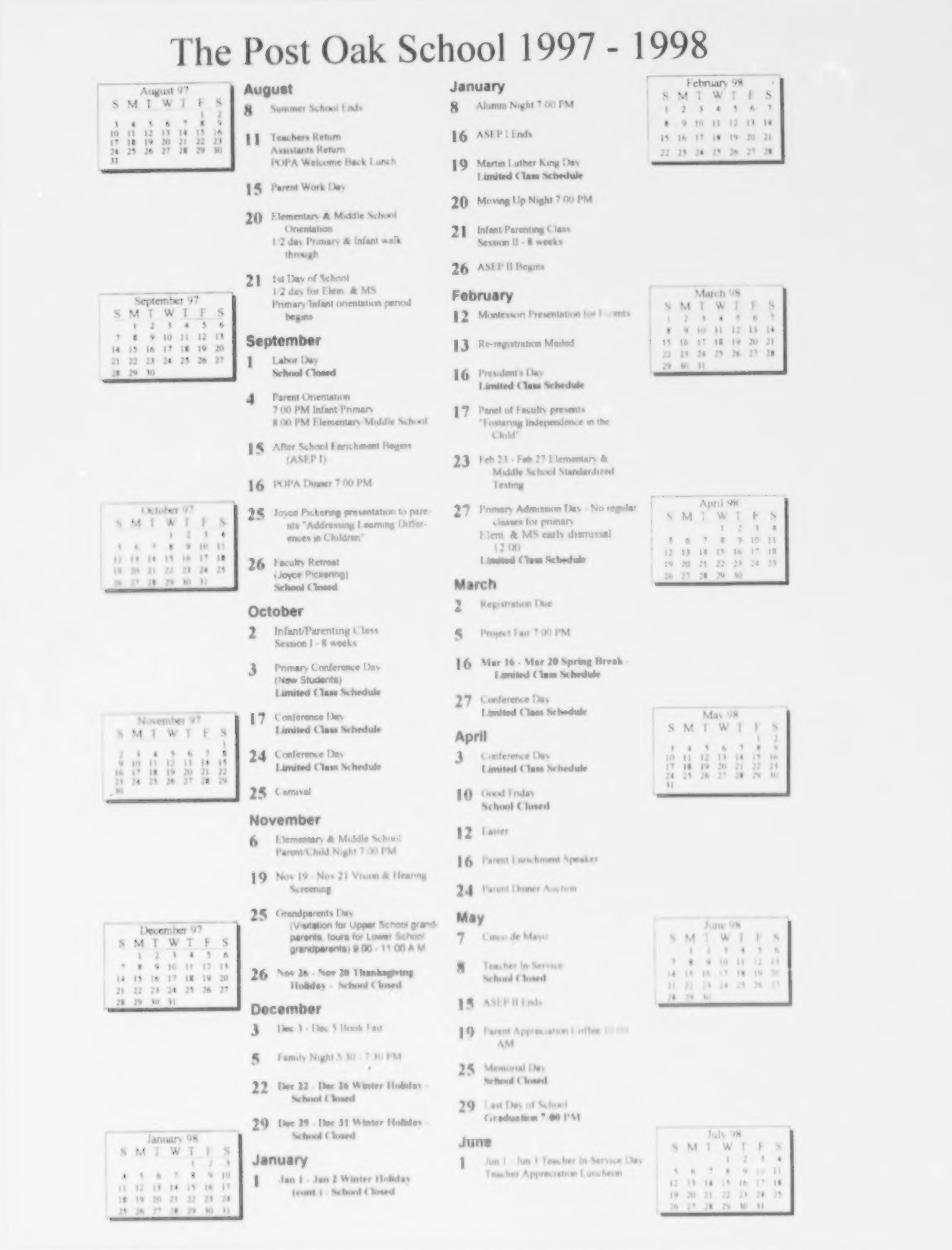
SEPTEMBER	3	Orientation Evening: Slide Show and Presentation by Paula Polk Lillard and Young Children's Community Directors. All parents welcome. *Attendance is required for all parents new to Forest Bluff.* 6:30 p.m. to 7:30 p.m.
SEPTEMBER	7	Welcoming Party at the home of Ken and Karen Campsa, 6:00 p.m. to 8:00 p.m. 1298 North Waukegan Road, Lake Forest.
SEPTEMBER	9	Continuing Education Series for Parents. The first of four sessions for all parents in which your child's director expands your understanding of Montessori theory and practice. Attendance is essential to your child's best development. Tuesday evenings 7:00 p.m. to 8:00 p.m.
SEPTEMBER	16	The second Continuing Education Session. 7:00 p.m. to 8:00 p.m.
SEPTEMBER	23	The third Continuing Education Session. 7:00 p.m. to 8:00 p.m.
SEPTEMBER	30	The fourth Continuing Education Session. 7:00 p.m. to 8:00 p.m.
OCTOBER	1	Fall Family Picnic (rain or shine) 3:00 p.m. to 6:00 p.m., Linda and Gabriel Vit, 17000 Wadsworth Road, Wadsworth, Illinois.
OCTOBER	11	"Montessori and the Future: Reflections of a Father and Grandfather", 7:30 p.m. Lecture by Larry Schaefer, Ph.D., Headmaster Emeritus, Lake Country Montessori School, Minneapolis, Minnesota.
DECEMBER	19	Christmas Visit 9:00 a.m. to 11:00 a.m. (For Parents and Grandparents only)

Weekday Morning Coffee Discussions with Paula Polk Lillard are planned for each classroom during the Fall and Winter months. You will receive individual invitations.

JANUARY	15	Elementary Evening: Presentation and Discussion 7:00 p.m. to 8:30 p.m. *(Parents of children four years old and over are invited to join this session)*
FEBRUARY	7	Fathers Classroom Visit with Your Child 9:00 a.m. to 10:30 a.m.
APRIL	16	Mothers Classroom Visit with Your "Extended Day" Child 1:00 to 2:30 p.m. Mothers Classroom Visit with Your Elementary Child 2:00 to 3:30 p.m.
MAY	8	Family Picnic at the Lake Bluff Beach 11:00 a.m. to 1:00 p.m.
JUNE	5	Operetta Performance at Gorton Community Center 7:00 p.m.

An annual calendar of school events encourages parents to plan ahead. The calendar is in two parts: one giving dates for orientations, holidays, etc., and the other listing parent events.

Calendar, The Post Oak School (Bellaire, TX)



The Post Oak School 1997 - 1998

August 97

S	M	T	W	T	F	S
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3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

September 97

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7	8	9	10	11	12	13
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21	22	23	24	25	26	27
28	29	30				

October 97

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12	13	14	15	16	17	18
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November 97

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30						

December 97

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7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

January 98

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4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

August

8 Summer School Ends

11 Teachers Return
Assistants Return
POPA Welcome Back Lunch

15 Parent Work Day

20 Elementary & Middle School Orientation
1/2 day Primary & Infant walk through

21 1st Day of School
1/2 day for Elem. & MS
Primary/Infant orientation period begins

September

1 Labor Day
School Closed

4 Parent Orientation
7:00 PM Infant/Primary
8:00 PM Elementary/Middle School

15 After School Enrichment Begins (ASEP I)

16 POPA Dinner 7:00 PM

25 Joyce Pickering presentation to parents "Addressing Learning Differences in Children"

26 Faculty Retreat
(Joyce Pickering)
School Closed

October

2 Infant/Parenting Class
Session I - 8 weeks

3 Primary Conference Day
(New Students)
Limited Class Schedule

17 Conference Day
Limited Class Schedule

24 Conference Day
Limited Class Schedule

25 Carnival

November

6 Elementary & Middle School
Parent/Child Night 7:00 PM

19 Nov 19 - Nov 21 Vision & Hearing Screening

25 Grandparents Day
(Visitation for Upper School grandparents, tours for Lower School grandparents) 9:00 - 11:00 A.M.

26 **Nov 26 - Nov 28 Thanksgiving Holiday - School Closed**

December

3 Dec 3 - Dec 5 Book Fair

5 Family Night 5:30 - 7:30 PM

22 **Dec 22 - Dec 26 Winter Holiday - School Closed**

29 **Dec 29 - Dec 31 Winter Holiday - School Closed**

January

1 **Jan 1 - Jan 2 Winter Holiday (cont.) - School Closed**

January

8 Alumni Night 7:00 PM

16 ASEP I Ends

19 Martin Luther King Day
Limited Class Schedule

20 Moving Up Night 7:00 PM

21 Infant Parenting Class
Session II - 8 weeks

26 ASEP II Begins

February

12 Montessori Presentation for Parents

13 Re-registration Mailed

16 President's Day
Limited Class Schedule

17 Panel of Faculty presents "Fostering Independence in the Child"

23 Feb 23 - Feb 27 Elementary & Middle School Standardized Testing

27 Primary Admission Day - No regular classes for primary
Elem. & MS early dismissal 12:00
Limited Class Schedule

March

2 Registration Due

5 Project Fair 7:00 PM

16 **Mar 16 - Mar 20 Spring Break - Limited Class Schedule**

27 Conference Day
Limited Class Schedule

April

3 Conference Day
Limited Class Schedule

10 Good Friday
School Closed

12 Easter

16 Parent Enrichment Speaker

24 Parent Dinner Auction

May

7 Cinco de Mayo

8 Teacher In-Service
School Closed

15 ASEP II Ends

19 Parent Appreciation Coffee 10:00 AM

25 Memorial Day
School Closed

29 Last Day of School
Graduation 7:00 PM

June

1 Jun 1 - Jun 3 Teacher In-Service Day
Teacher Appreciation Luncheon

February 98

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

March 98

S	M	T	W	T	F	S
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April 98

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May 98

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June 98

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July 98

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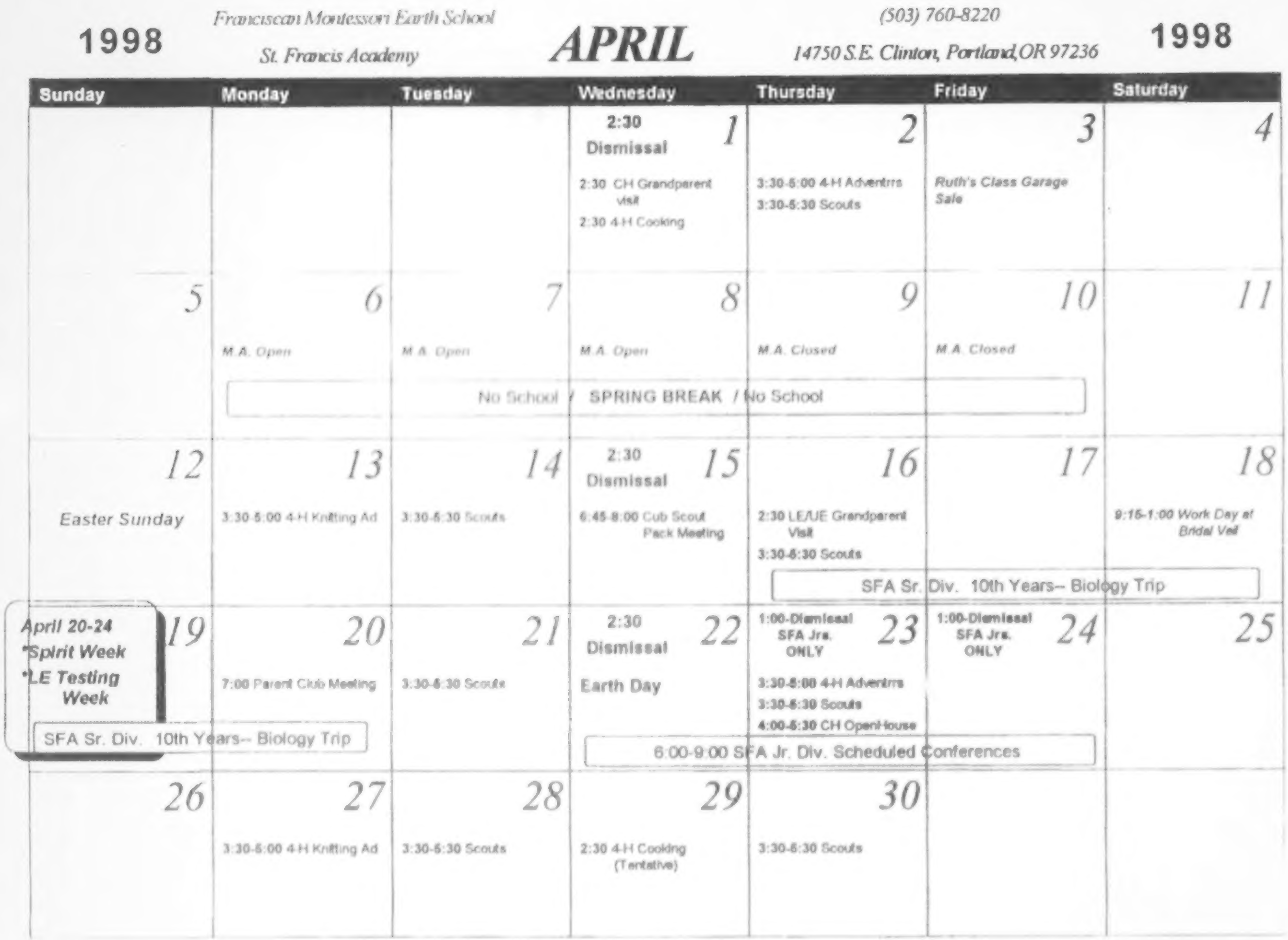
Post Oak combines all dates and events into one calendar, using a clear and attractive format.

Monthly Calendar, Franciscan Montessori Earth School (Portland, OR)

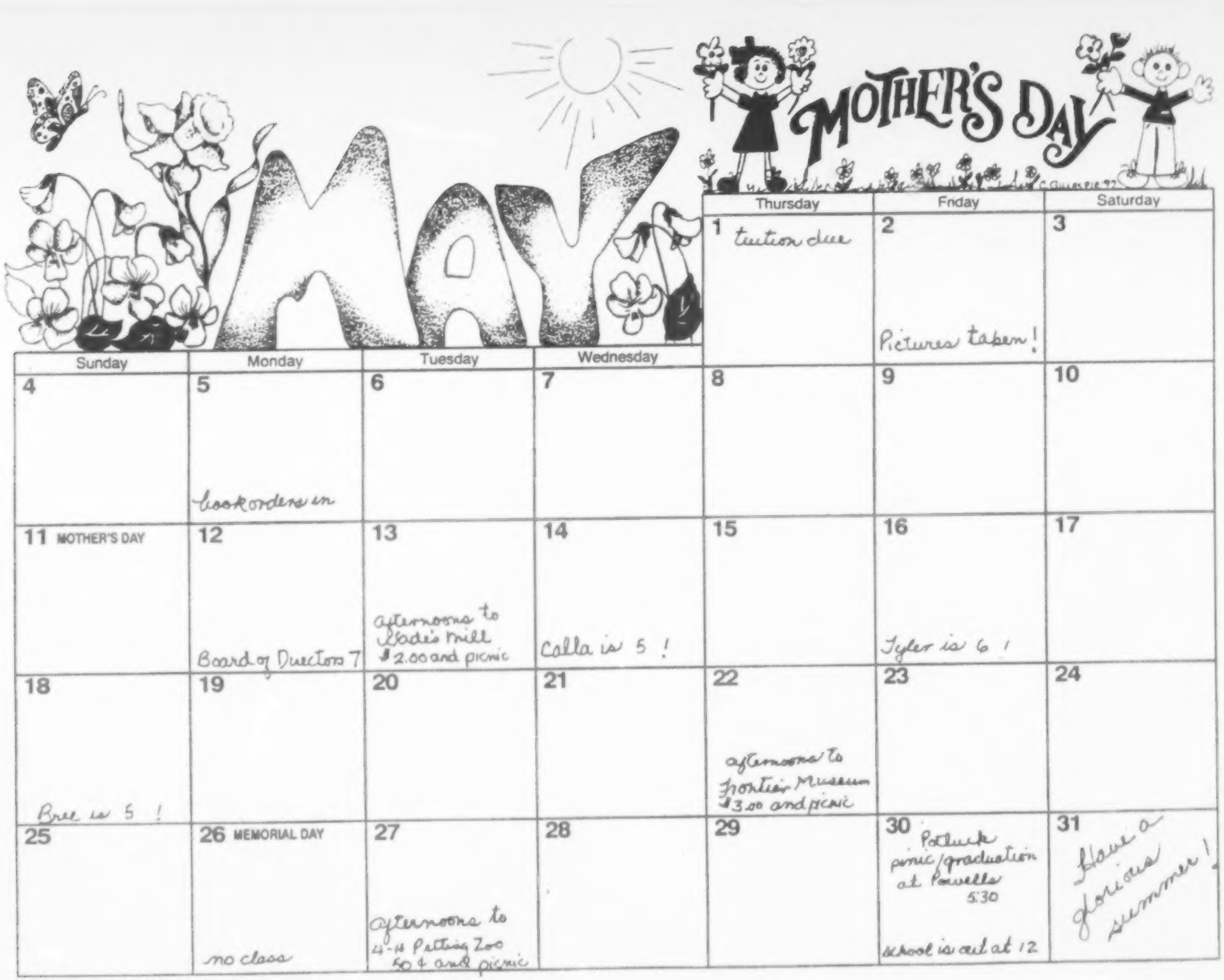


1998 *Franciscan Montessori Earth School*
St. Francis Academy
APRIL
(503) 760-8220
14750 S.E. Clinton, Portland, OR 97236 1998

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1 2:30 Dismissal 2:30 CH Grandparent visit 2:30 4-H Cooking	2 3:30-5:00 4-H Adventrrs 3:30-5:30 Scouts	3 *Ruth's Class Garage Sale*	4
5	6 *M.A. Open* No School / SPRING BREAK / No School	7 *M.A. Open*	8 *M.A. Open*	9 *M.A. Closed*	10 *M.A. Closed*	11
12 *Easter Sunday*	13 3:30-5:00 4-H Knitting Ad	14 3:30-5:30 Scouts	15 2:30 Dismissal 6:45-8:00 Cub Scout Pack Meeting	16 2:30 LE/UE Grandparent Visit 3:30-5:30 Scouts SFA Sr. Div. 10th Years-- Biology Trip	17	18 *9:15-1:00 Work Day at Bridal Veil*
19 ***April 20-24*** ****Spirit Week*** ****LE Testing Week*** SFA Sr. Div. 10th Years-- Biology Trip	20 7:00 Parent Club Meeting	21 3:30-5:30 Scouts	22 2:30 Dismissal Earth Day 6:00-9:00 SFA Jr. Div. Scheduled Conferences	23 1:00-Dismissal SFA Jrs. ONLY 3:30-5:00 4-H Adventrrs 3:30-5:30 Scouts 4:00-5:30 CH OpenHouse	24 1:00-Dismissal SFA Jrs. ONLY	25
26	27 3:30-5:00 4-H Knitting Ad	28 3:30-5:30 Scouts	29 2:30 4-H Cooking (Tentative)	30 3:30-5:30 Scouts		

Monthly calendars alert parents to upcoming events. They include detailed information that is not printed on the annual calendar.

Monthly Calendar, Staunton Montessori School (Staunton, VA)

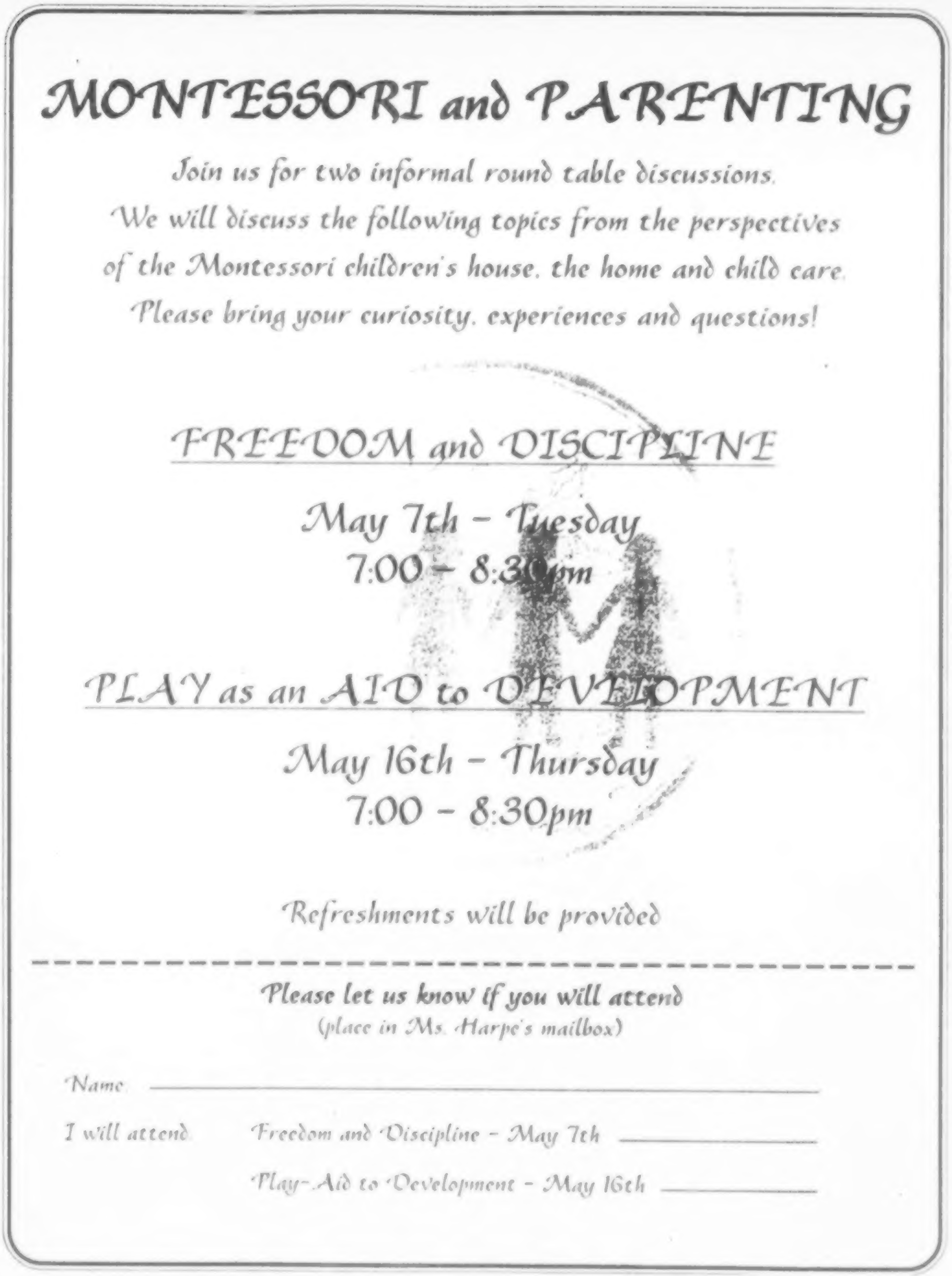

MAY
MOTHER'S DAY

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1 tuition due	2 Pictures taken!	3
4	5 book orders in	6	7	8	9	10
11 MOTHER'S DAY	12 Board of Directors 7	13 afternoons to Sadie's Mill $2.00 and picnic	14 Calla is 5 !	15	16 Tyler is 6 !	17
18 Bree is 5 !	19	20	21	22 afternoons to Frontier Museum $3.00 and picnic	23	24
25	26 MEMORIAL DAY no class	27 afternoons to 4-H Petting Zoo 50¢ and picnic	28	29	30 Potluck picnic/graduation at Powells 5:30 school is out at 12	31 Have a glorious summer!

This class calendar includes children's birthdays

BEST COPY AVAILABLE

Parent Event Invitation, Webster Montessori School (Webster, NY)



MONTESSORI and PARENTING

Join us for two informal round table discussions.
We will discuss the following topics from the perspectives
of the Montessori children's house, the home and child care.
Please bring your curiosity, experiences and questions!

FREEDOM and DISCIPLINE

May 7th – Tuesday
7:00 – 8:30pm

PLAY as an AID to DEVELOPMENT

May 16th – Thursday
7:00 – 8:30pm

Refreshments will be provided

Please let us know if you will attend
(place in Ms. Harpe's mailbox)

Name ____________________

I will attend Freedom and Discipline – May 7th ____________

Play-Aid to Development – May 16th ____________

This invitation to a parent discussion series includes an RSVP form.

These are the leader's guides from NAMTA's Montessori *Talks to Parents*, a series of six booklets, each comprising an anthology of Montessori readings. Parents read a booklet and then come to the meeting for discussion.

MONTESSORI
TALKS TO PARENTS

The Home Environment

in cooperation with the Association Montessori Internationale U.S.A.

AMI

Parent Discussion Guides from NAMTA

A Do-It-Yourself-Parent Education Guide

Everyone benefits from a solidly conceived parent education program. The collective wisdom which emerges in a parent discussion group educates the educator, bringing him into contact with intimate parenting experiences. The parent's daily work is given much higher significance when it is shared in discussion. And lastly parent education aids the school in developing a loyal and dedicated parent group who can spread an enthusiastic Montessori message.

The following is a **Do-It Yourself Parent Education Guide** which offers inspiration to the independent parent education program. It is up to the teacher, however, to see each group discussion as individual, spontaneous, and unique. We include merely a suggested format for utilizing the content and thereby facilitating **Montessori Talks to Parents**.

HOW TO GET STARTED

Decide how you will establish your attendance. Will you make seminars mandatory, or will you extend a sign up invitation? Seminars should be publicized at least a month in advance. The editor's intent was that the group meet twice for each magazine series (two weeks in a row). If you are really prepared, advance publicity should be incorporated into your school calendar. Even if your voluntary attendance has only one or two to begin with, don't be discouraged. The effects of a good discussion, no matter how small, can never be measured. It is most likely that your discussion group will gradually increase in stature and number.

As soon as parent enrollment is determined, give each parent their magazine and ask them to read the contents **before** coming to the seminar. However, to aid in the assimilation of the material, it is advisable to read orally two or three passages from the material to refresh the discussion group with a more meaningful examination of the material.

The group leader may wish to delegate hosting responsibility to a designated person who would provide the house, facilitate introductions, serve refreshments, and provide a general warm welcome. Another secondary position for the group presentation would be a librarian who maintains an ongoing Montessori library and processes book orders for the same. It is important that the leader arrange for help so that the discussion does not appear to be a one man show.

Each group discussion can be introduced utilizing the following elements:

a) The leader should give practical information regarding the location of the telephone, wash rooms, personal thanks to the hostess, etc.

b) Families should introduce themselves according to number of children, ages and teacher.

c) The leader briefly summarizes the material to be covered in the discussion series.

The purpose of the introduction is to make parents feel comfortable. One might stress that, although certain approaches will emerge in discussion, everybody is different and will have their own ways of interpreting the material. It is important to emphasize that the resource of the group is the collective experience of everyone, as well as the Montessori point of view.

The main objective of the discussion approach is to acquaint the parents with Montessori insights. The parent discussion should seek to impart specific principles which the parent then applies to his own situation in an individual manner. The object is not then to tell the parents how to resolve their children's problems necessarily, but rather to supply them with a vision, a new way of seeing themselves in relation to their children and school.

A good leader elicits the parent without "talking at them." To avoid lecturing, a general rule of thumb for the leader is to **ask questions and nothing more**. If discussion is becoming too abstract, the questions should elicit more practical kinds of responses (e.g. What happened today that tells us what you mean . . . Describe a situation . . .) Whatever the dynamic of the moment might be, the good leader learns that the discussion group will retain its experience best when the parents are doing the talking.

The topical questions included in the leaddr's guide are set up as both lead questions and follow up questions. The lead question is general. The follow up questions develop the lead question and are immediately listed below the lead. Certain follow up questions may have corallary questions of their own listed below them. Each subset of questions (see outline format) further defines and elicits the material. These questions are provided as tools. The leader must decide when and how they should be used.

It might be helpful for the leader to perceive that there are really two kinds of questions. There are those questions which are factual or interpretive bringing the discussion into analysis of Montessori's writings and ideas. The second question type is more personal and thought provoking hoping to make the principles applicable to the individual experiences of the group members.

A group leader, after asking his question, is not afraid of pauses. It takes time for good thoughts to reach the surface. Never fill the void with an answer to your own question. Rather simply move to another question possibly more factual or more personal, according to the needs of the moment.

Within the question format, classroom presentations could be given to vary the program, and to convey what goes on during the children's school day.

GROUP PARTICIPATION

Many times only a small minority of parents speak out in a parent meeting. As the leader gets to know parents he can draw out others through eye contact, even by direct referral of a question. (Mrs. Jones, you looked like you had something to say about . . .) However it is important to realize that many people come to listen, or may not have experience relative to the discussion at hand. It would cause certain individuals embarrassment to force them to participate.

THE LEADER'S ROLE

Even if the leader is not a parent himself, he has much to offer as "an adult working with children" in a Montessori environment. As an observer of a group of children on a comparative basis, the Montessorian is able to generate unique anecdotes and insights about the school community. The parents need this information, they crave the satisfaction of knowing the day-to-day happenings which evolve in the life of their children. The parent discussion group is a cultural exchange. The teacher learns about the home and the parents about the school. That special bond between teacher, child and parents solidifies so that all work effectively for the common cause — the child's self development.

Parent Discussion Guides from NAMTA (continued)

The leader is a modulator of experience. Each discussion group takes on its own character; the leader must balance the emerging perspective. This may require taking different positions at different times. Although the Montessorian sees himself as the interpreter and defender of the child, a zealot or purist in this regard may lose his parent following if he doesn't give the parents sympathy and understanding. Many times guilt and remorse emerge in these sessions and it is helpful to alleviate these feelings. To point out the well known fact that children adapt may spare inexperienced parents some anxiety about confessed mistakes. After all children do bounce back. Another consoling aside is that children will always sense good intentions, even when actions do not conform to the highest Montessori standards. The main thrust is to learn from our mistakes, and use them as an occasion to mature and grow.

Apart from the "question approach" which elicits the parent's experience, the group leader could occasionally present a short lecture which raises the group experience to a philosophical level, so that Montessori ideals are conveyed in concentrated form.

If the teacher's life experience in childrearing is limited, he may be able to supply idealism and moral conviction by promoting family life as life of the highest order and purpose. However, ideals must be related to both successes and failures of parents, and failures in particular must be seen in a positive way. To realize that you have done something wrong in the past gives you the hope of doing something right for the future. If we make mistakes in the past we surely do not want to continue them. We want to change. Fortunately the trials and errors are remediable because the intelligence of love, unique to the human species, has curative powers.

THE PARENT'S ROLE

Parents should realize that no educational institution can supplant the parent's role. "Parents are educators by nature appointed by God. The educational institutions are subordinate and limited and therefore rely on the parents to become involved." (Joosten, 1977). The Montessori class is not a dumping ground.

The school then is a secondary partner and collaborator in the life of the child. The parent is the ultimate educator, and must be prepared to love and grow with his children in the spirit of unselfishness. Montessori says this best:

> Nature inspires both parents with love for their little ones, and this love is not something artificial. . . . The love we find in infancy shows what kind of love should reign ideally in the grown up world, a love able, of its own nature, to inspire sacrifice, the dedication of one ego to another ego, of one's self to the service of others. In the depth of this love parents renounce their own lives to dedicate them to their children. And this devotion is natural to them. It gives them joy and does not feel sacrificial. . . . The efforts parents make for their children are a point of parenthood itself. The child awakens what adults think of as an ideal, the ideal of renunciation, of unselfishness, virtues almost unreachable outside family life.
>
> Maria Montessori **Absorbent Mind**

The school, through the medium of the discussion group, should allow parents to extend their knowledge of the child and his development needs. The key principle for recollecting and evaluating experience would be then to what extent parent's decisions truly aid the child. The leader should be prepared to enlighten the parents by sharing together how we learn and develop from the child. To once again quote from Montessori:

> Man would degenerate without the child to help him to rise. If the adult does not waken little by little, a hard crust will form around him and make him insensible.
>
> Maria Montessori, **Secret of Childhood**

Topical Questions for Discussion
The Home Environment
Meeting 1

Meeting #1 is geared to discussion only. Meeting 2 includes presentations to diversify the format.

I. Prepared Environment

What should be our purpose in designing a home environment keeping the CHILD in mind?

A. When you were first married did you have aims for preparing the home? Did design change when children arrived? Why? (Analyze reasons. Did changes benefit the children?)

B. What is the purpose of child proofing a home?
  1. How do we deal with a child climbing over a new sofa?
  2. Should we let children handle our prized possessions?
  3. What if a child uses a toy as a hammer?
  4. What items would you remove from an environment for an infant? for a toddler? for a pre-schooler?

C. Why does Montessori suggest a child's corner in every room? When Montessori says the child is satisfied with things made for him what does she mean?

D. Do playpens fit the Montessori concept of prepared environment? cribs? gates? Why or why not?
  1. Does your child get out of bed and come into your room? What is your reaction?
  2. What possibilities for development do stairs offer?
  3. Should children have definite bedtimes?

E. Montessori speaks of the child's ability to intuit "a gracious setting from an ugly one." What is the relationship between beauty and the child's activity?
  1. Do children prefer beautiful things?
  2. Are expensive toys preferable to cheaper items?
  3. Do children prefer new toys to antiques (something old)?
  4. What would be the desirable features of a child's playroom? What are the advantages and disadvantages of a basement?
  5. What are some every day possessions of the child that could be made more beautiful in design and embellishment?

F. What are some activities which are considered dangerous? At what age do they become safe? (e.g. matches, knives, carrying glass, transporting pencils, crossing streets, driving without carseats.)
  1. When does anticipated danger limit a child's development?
  2. How can one anticipate danger in a positive manner?

End of Meeting I

Meeting 2

II. Purposeful Activity

When Montessori says "an adult seeks to perfect the environment, the child seeks to perfect himself," what distinction is being made between the adult's work and the child's work?

A. How is the child's time and pace different from the adult's?
  1. When you take a walk, shop or do errands with a child what do they like to do? Do you let them?
  2. What does Montessori mean when she says "children use things for ends unintelligible to adults?" Should the younger child be judged by his product?
  3. Should an adult interrupt a child's activity? Your child is engrossed in a book and you want to hug him because he looks so adorable.

B. How does purposeful activity differ from fantasy play? A child zooming with a boat in a bathtub is doing an activity which is quite different from dusting a table. Are both exercises developmental? Do we encourage both?

III. Independence

What does Montessori stress in the development of the child's independence? What does she mean by independence? Why is independence important?

A. How does independence relate to preparing the home environment?
  1. What is the best kind of storage for the child's toys? books? records? clothes? keeping independence in mind.
  2. What kind of furniture in the bathroom, bedroom, kitchen would encourage independence?

B. What do we do for the child during the day that he could do for himself? How could we structure tasks so that the child could be more independent?

C. Have you ever demonstrated to your child how to care for himself or his environment? (wiping up spills, picking up dropped items, putting away toys, washing face and hands, toilet training, bathing, making bed, dressing themselves, hanging up clothes). At what ages? Why did you pick certain activities?

D. Have you observed that girls are more independent than boys or vice versa? Would sex determine what you would show a child? Would you show a boy how to use a hammer, but hammer the nail for the girl yourself?

Presentations (for the Montessori trained teacher) if possible allow time for parents to practice.

Handwashing
Folding, folding clothes
Floor scrubbing
Pouring
Dusting
Carrying a pitcher, a chair.
Dressing frames
Sweeping

Leader should convey principles of movement analysis stressing the sensitive period for the child.

Creative Activity Analysis of Movement

Describe every step in brushing your teeth. What did you forget? What are difficulties to be isolated? What are points of interest? Put on a sock with economical ("Japanese tea ceremony") motions and while you are doing it tell us each step.

End of Meeting 2

Parent Discussion Guides from NAMTA (continued)

Supplement

Topical Questions for Discussion
The Road to Discipline
Meeting 1

series one number two

I. **Obedience**

What does obedience mean to you? What does Montessori mean by stages of obedience?

- A. What is the connection between self mastery and obedience?
- B. Why do children obey?
- C. Is it natural for children to obey or disobey?
- D. Should children mind on the dot? How much latitude should we give to the child after we make a request? (e.g. supper is at six. You tell the child to set the table at 5:30.)
- E. When is it important to follow an adult command "letter of the law"? When is it not important?
- F. How do we establish limits without inhibiting "reasonable forms of activity"? Can we have freedom within limits?
  - 1. Should children be permitted to question commands?
  - 2. When should we allow activity to continue? Should we say no to a toddler? What is the most effective way to limit or change the activity of a toddler? of an older child?
  - 3. Everyone has their own limits. What are some of yours and how did you arrive at them? Are you consistent? When do you make exceptions? Do you change limits for different ages in your family? How do you explain that to siblings?
  - 4. Montessori distinguished "distributive justice" from "true justice". Most children believe in distributive justice, that all children should get exactly the same. True justice administers differently to each individual child according to the child's needs. Can true justice be justified to children? Is it important to treat every child the same?

II. **Discipline**

What is usually meant by discipline? What is the Montessori definition of discipline and how does it differ from the usual connotation?

- A. How does the prepared environment develop self discipline?
  - 1. What activities in the home develop self discipline and concentration?
  - 2. How does choice develop self discipline? What are different ways to give children choices in their everyday life?
  - 3. When going places, how can one plan to enhance the child's interest so that children can develop "inner motivation" on the go?
- B. In a strictly adult environment or situation, how does a child's behavior change?
- C. How does television affect child behavior?
- D. What are natural frustrations or conditions which contribute to a breakdown of discipline? (e.g. loss of sleep, ear infections, nutrition, change in home life, etc.)
- E. Why does Montessori say that the adult should always "be calm and act slowly" for the child's self discipline?
- F. What happens when you interrupt a child's activity?

III. **Mistakes and their Correction, Rewards, and Punishments**

- A. What is Montessori's view towards mistakes?
  - 1. How do you react when an adult or child corrects you?
  - 2. When, how and should you correct in the following circumstances?
    - a. Child shows bad manners
    - b. Child speaks incorrect grammar
    - c. Child chooses ill-matching clothes
    - d. Child talks back
- B. Why does Montessori consider it preferable to do something for internal development rather than for external rewards? Is this approach always possible?
  - 1. Is there ever a time when it is appropriate to punish, reward or spank?
  - 2. Is it natural for children to want to please adults? Should adults be alarmed if children work to please them? Should adults encourage such motivation?
  - 3. How does one encourage self motivation?
  - 4. Should and how do we give praise to a child's work?
  - 5. To what degree should one criticize the work of a child? How do you make criticism constructive?
- C. Do parents need to present a united front in administering limits, rewards and punishment? What happens when one parent is sole disciplinarian?
- D. Should there be a court of appeals where a child can use one parent to plead his cause? Why or why not?
- E. How should you approach the following behavior?
  - 1. A child is highly disagreeable.
  - 2. A child refuses to sleep.
  - 3. A child disturbs merchandise in a supermarket.
  - 4. A child spills his milk twice in one sitting.
  - 5. A child refuses to pick up his toys. ☐

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Supplement

Topical Questions for Discussion:
The Spiritual Side of Love
Meeting 1

series one number three

I. **Love and Children**

How do the expectations of love in marriage change with the arrival of children? What is the child's contribution to the relationship between the parents?

- A. How do parent's rights and needs balance with those of their children's? Which are more important?
  - 1. How do you handle a child interrupting a phone call or a conversation between adults?
  - 2. You are involved in an activity. Your child wants you to play.
  - 3. You have planned a work evening. Your child isn't tired.
  - 4. Describe an occasion where a child has needs which seem to clash with your own. How can such conflicts be avoided?
- B. Montessori says "taking the child with you" provides the child with an occasion to see the world and is an expression of parent love. When and how often do you take the child with you? Where? Under what circumstances do you leave the child?
  - 1. Under what circumstances should the care of children be entrusted to others? What are the best conditions for care of children by other than the parents.
  - 2. How do your children react to babysitters? How are babysitters introduced to your child? How much advance notice do you give your children when you are going out? What do you tell them? How does your child behave?
  - 3. How long a separation can a child accept and at what ages? What are some observable indications that the child is ready for separation.
  - 4. Have you changed your social life, hobbies, leisure activities, or sports to include your children?
  - 5. Have you found other families who enjoy gatherings with children present?
- C. How can the parent's presence be most sincerely felt as love?
  - 1. What does it mean to focus in to your child's play and activity? Do you confide in him? To what extent do you express negative feelings? What are effective ways to communicate negative feelings without hurting self esteem?
  - 2. Do you talk about your child in front of him? What is the nature of those comments?
- D. What are the effects of over indulgent love. Examples:
  - 1. Over permissiveness
  - 2. Possessiveness
  - 3. Martyr parent
  - 4. Materialism-excessive presents
  - 5. Dependency restraints
  - 6. Lavish approval and praise
- E. What is the best emotional climate for the spiritual embryo?
  - 1. How do you handle disagreements between you and your spouse in front of your children? How do the children react?
  - 2. In what ways is affection expressed so that the children understand?

II. **Spiritual Development**

How has a religious background contributed to your development, and what contribution will it make to your children's development?

- A. Do you believe in raising your children in a particular faith? What are the benefits?
- B. Have you seen any spontaneous expressions about the transcendent? (Where do I come from? Who made me?)
- C. Do you believe that young children have religious needs? Spiritual needs?
  - 1. What heritage communicates morals and high ideals? What source material?
  - 2. What sensibility prevents a child from becoming tied to a materialistic culture?

Parent Discussion Guides from NAMTA (continued)

Supplement

Topical Questions for Discussion
The Parent, the Child and Language Development

series two number one

Meeting 1

I. Language Development

Meeting 2

I. Literature and Reading

What is the role of literature in language development?

- A. What are the criteria of a good children's book?
  - 1. In reading out loud to children, should we choose easy-to-read books or books which are more advanced than the child's vocabulary and reading ability?
  - 2. Are there boy books and girl books, or is this strictly a sexist consideration?
  - 3. Should a child's library contain a large number of books or a limited number? Is there an advantage to repetition of a few books or exposure to many with less repetition?
  - 4. Do your children show universal likes and dislikes?
  - 5. Should we select humanly personified animals for children's literature (talking bears)? Can children reconcile these books with reality?
- B. At what age did you start reading out loud?
  - 1. Does it make any difference if the mother or father reads?
  - 2. Is reading out loud truly a "family affair" or should children of different ages have special reading sessions?
  - 3. Should there be a specific reading time or should the child's mood govern when we read out loud?
- C. What is an ideal reading environment in terms of book storage and display as well as comfort? What fosters concentration?
  - 1. What should be the parent's role in teaching the child reading? Is this strictly a school function?
  - 2. What is reading's purpose? How important is it to learn to read young?
  - 3. Should a parent push a child to read? How should a parent participate?
  - 4. Should parents encourage their children to read out loud and at what age? Should parents correct mistakes or check comprehension?

Activities:

1. Suggest sound games ("I spy") that parents could play at home for fun. 2. Demonstrate the sounds and prepare a sound pronunciation chart. 3. Set up a book display using school library examples as well as parent selected examples. (Each parent could be asked to bring some family favorites.)

Supplement

Topical Questions for Discussion:
The Child In Nature
Meeting I

series two number two

I. Going Out

What does the out-of-doors mean to your child?

- A. What do your children most often notice on walks? Do they see more on their bicycle or on foot?
- B. What are your children's experiences in the care of animals and plants? What do they enjoy the most about such events?
- C. What nature trips do you make, and to what degree do you limit your child's activity on these trips? What do you encourage him to do?
- D. How can nature outings be maximized in your own backyard?
- E. Have you every killed animals (insects included) in front of the child? What effects do you observe?
- F. What fears do your children have in nature? How have you helped him overcome these fears? How did they originate?
- G. What are your local "islands of green," and how are they geared to the children's enjoyment?
- H. How can you intensify a child's experience in nature?
  - 1. How do you increase the child's sensorial awareness to particular natural objects?
  - 2. What is the relationship between knowing the names of things and experiencing nature?
  - 3. How extensively do you integrate book preparation with going out? What is the effect of using books in relation to the real thing?
  - 4. Are zoos effective? What can improve a zoo visit?
- I. What are your child's favorite garden delights?

II. Nature Education

Why is nature study important to the child's development?

- A. How do you first present death and extinction in nature?
  - 1. Do children see death in nature differently than adults?
  - 2. What is the significance of "keeping animals alive" to the young child? Dying pets, maimed wild animals.
- B. What are the particular roles of prehistoric knowledge of nature in contrast with contemporary facts?
- C. Is it always important to be factual in nature study? What is the role of nature lore and fancy? Should one fantasize about nature young children?
- D. How do you answer a child's questions of sexual reproduction in nature?
  - 1. What do you say about mating relative to age?
  - 2. Should animal reproduction be a point of departure for discussing human reproduction? Should they be discussed with any different emphasis?
  - 3. What should be the emphasis on the procreative aspects?
  - 4. Should parents show themselves nude to their children?
  - 5. Should sex education be handled by the school? What should be the measure of parent involvement?
  - 6. To what extent should children be permitted sexual exploration? How should limits be expressed? □

Supplement

MONTESSORI
PARENTS
Nurturing The Creative Personality

Topical Questions for Discussion: Nurturing the Creative Personality

series two · volume three

I. Art and Music in the Home

A. **Music.** What kinds of musical experiences did you plan for your child in the nursery years? In the childhood years? What were your personal music experiences?

1. What kinds of music are most enjoyable and enjoyable to children?
2. What are your children's favorite records? At what age is a record player introduced? A cassette tape recorder? (Bring samples to the meeting)
3. Do you need to sing to your children on tune? What songs do your children know and how did they learn them? What role does song play on a day to day basis?
4. What is the role of instrumental music in a child's life? At what age are formal lessons with particular instruments desirable? Should lessons be forced?
5. What are some of the opportunities for rhythm and movement in everyday life?
6. Do you have to be musical to engender musical ability?
7. What degree do you enforce music discipline? To what degree do you leave it up to the child?

B. **Art.** Do you need to introduce Art in the home? What inhibitions do you have about art with regard to mess, use of the material, storage of art supplies?

1. To what degree is representational art important? What kind of media are most expressive?
2. How would you design the ideal art shelf displaying self directed activities? Do art projects need to be directed in any way especially by the unartistic parent?
3. How can children's art be most effectively appreciated? What kind of praise can be used?
4. What is an effective way to make paint available in the home?
   a. How are fingerpainting and brush painting different?
   b. Should children paint on walls? How can this impulse be redirected?
   c. What are some approaches to color appreciation: naming and mixing?
   d. What are some stages children go through as they develop toward representational art?
5. What are the advantages of three dimensional art?
6. What are good household sources for art assemblage material as well as storage containers?

II. **Creative Development.**

What is the relationship between creativity and development?

A. How do Montessori's generalizations about different planes of development help define activity?

1. Early Years (under 6)
   a. Do children really want to work? How do work experiences relate to creative development?
   b. What are some of the creative choices related to care of self? How is care of self uniquely developmental for the very young child?
   c. As children grow, how do their plans change and develop?
2. The Childhood Years (6-12)
   a. How can intellectual curiosity be matured into interest? How can adults build interest?
   b. What does Montessori mean by cultural exploration? How is the Montessori approach to culture different from our stereotyped idea of culture?
   c. What kinds of independence would you expect from an older child in terms of house chores, social life, buying clothes? What were some of your feelings towards independence as a child? How are independence and creative development related?

B. The Creative Unconscious.

1. What facts do you remember or have forgotten from your school experience? What were the lasting lessons? Were they intended, forced or part of an incidental side effect?
2. What is the relationship between rest and hard work in creative development?
   a. Should children be expected to work or pay attention at all times? What is the role of forgetting and distraction?
   b. To what degree can learning be relaxed? Are certain children better suited to indirect, incidental learning experiences than others?

C. Imagination. How is the Montessori definition of imagination different from your own?

1. Describe the kinds of fantasies your children have. Where do they originate?
2. Are adult fantasies imposed on children (Santa Claus, Easter Bunny, Tooth Fairy) developmentally harmful or helpful? (At what age?) What should the adult response be to pretend? What is the significance of pretend in play situations between child and adult and child and child?
3. How is imagination stimulated by studying reality? What kinds of experiences have stimulated your child's imagination?
4. What does Montessori mean when she says a "child is able to grow in imagination?"

Suggestions:

Advise participants to bring a choice record of their children's.

Invite music and art specialists who advocate parent involvement and who will not discourage parents with a show of expertise.

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Parent Observation Guidelines, Henson Valley Montessori School (Temple Hills, MD)

Observation guidelines give parents important tips on how to observe without disturbing the class. They also guide parents to focus on various aspects of the Montessori environment. The example here includes a parent response form.

Henson Valley Montessori School
7007 Allentown Road
Temple Hills, MD 20748
(301) 449-4442

NOTES TO OBSERVERS

Good Morning! We hope you enjoy your visit with us this morning. You should have the opportunity to see many different exercises in progress.

Most of the work being done falls into four major categories: practical life, sensorial exploration, language, and mathematics. Each category is represented by a series of exercises arranged in roughly sequential order (left to right, top to bottom) on the shelves grouped together in that category. The rug mats in the classrooms are used by the children to isolate and organize their work. Please be careful not to step on the mats.

The children who are engrossed in practical life exercises, such as washing a table, polishing brass, or pouring water, are developing independence along with their abilities to concentrate, to control their movements, and to follow a procedure composed of sequential steps. Children working with materials for sensorial exploration, such as the pink tower, the geometric cabinet, or the touch fabrics, are further classifying impressions perceived through the senses and becoming clearly conscious of differences of quality among objects in the environment. Children working with language materials gradually become aware that language is an expression of the spirit of man and a powerful means of communication between men. Children working with mathematics material are learning that in mathematics there are all kinds of exciting relationships and patterns to be explored.

You will note that some children are able to become absorbed in their work, while others are not. The degree of this absorption in a task is an indication of the degree of the child's normalization. The normalized child is one who works purposefully, intently, independently, and with a spirit of joy in his work.

If you have a child in the class, please keep in mind the fact that your own child will be excited by your presence. He may try to perform for you; he may become shy; he may not be able to tear himself away from your side. In any case, his behavior in the class will probably be somewhat different than usual. For this and many other reasons, it is unwise to try to compare your child with the others.

Remember that the more unobtrusive you remain, the better your chance of seeing the class as it normally functions. Try not to engage the children in conversation. If they come up to you and ask you a question or show you something, a simple answer, a smile, or a word of approval should be enough to satisfy them.

Thank you very much for coming. We sincerely appreciate your interest.

Henson Valley Montessori School
7007 Allentown Road
Temple Hills, MD 20748
(301) 449-4442

OBSERVATION GUIDELINES

Welcome to the classroom. We are happy you are able to visit and we hope it will be an informative and a positive experience. Observation is difficult. It is important that you observe as a naturalist observes--without interaction that would disturb and change the phenomenon.

- Please sit quietly.
- Do not interact with the teacher unless you are approached.
- If children approach you, be pleasant but brief. You may say something like "I came to see you work."
- Observe one child within the classroom, of different ages.
- Observe the entire class.
- Look for qualities of independence, self-discipline, self-direction, attention, concentration and joy.

NAME ______________________

DATE ______________________

TEACHER ______________________

COMMENTS AND QUESTIONS

Parent Observation Guidelines, Montessori School of Raleigh (Raleigh, NC)

These guidelines give specific procedures for different age levels. The statement of visitation policy is welcoming and emphasizes the desire for feedback.

Observation Guidelines

Welcome to our school. We hope your visit will help you learn more about our classroom environments and the Montessori experience. Please plan to observe a minimum of 30 minutes to experience a true feeling of the Montessori environment and methodology of education. If you would like to observe longer, you are very welcome.

Both professional etiquette and State law require that all observers be announced to the Office immediately upon arrival on campus. While the School asks that observations be scheduled in advance so that observers are not disappointed because of overcrowding, impromptu visits announced to the Office are always welcome.

Observers of one environment may not "float" to other environments on campus without permission from the Office. A copy of the legal statute which governs parental access to their children while they are in school and which forms the basis of our own requirements is available from the Office.

All observers are given an observation form which they must complete and return to the Office before their departure from campus. Each form is read daily by the Executive Director, Curriculum Coordinator, and by the teacher of the environment observed.

If you have any specific questions regarding the classroom, jot them down on your observation notes and wait for the appropriate time to talk with the teacher. If the teacher is not free, then leave your phone number and we will call you at our earliest convenience. Professional etiquette and a positive home-school partnership also require that any questions, concerns or suggestions about observed behavior and classroom management be shared in a timely fashion directly with the teacher and then, if necessary, with the Curriculum Coordinator.

We are happy that you want to observe our school, and we hope your visit will be an enjoyable one

We all try to use quiet voices in the classroom so that we do not disturb others who are working. Showing respect towards the child or the child's right to work is a very important part of our program. We appreciate your cooperation.

Specific for Toddler

Parents of children currently in the class need to observe through the observation window as it is most confusing to the toddlers to experience any change in their routine. Should a parent see their child coming toward the hallway door, it is highly recommended that they move promptly out of sight. Toddlers' confusion when seeing their parents unexpectedly will disrupt classroom harmony and might require that the toddler be taken home with the observing parent.

Visitors wishing to observe in the classroom should contact the teacher through the Director of Admissions to ascertain the children's readiness for a stranger's presence in their environment. Once seated in the environment, the observer is asked to please remain in your chair and try to avoid making eye contact or distracting the children. Concentration is not easily achieved by toddlers and some may still experience stranger anxiety.

Specific for the Children's House

Parents of children currently in the class need to observe through the observation window. This will allow you to observe your child as he/she typically functions in the classroom. An observation chair will be provided for visitors and parents observing in the classroom. Unnecessary movement can be very disturbing to the young children. Please remain seated in the observation chair and try not to distract the children from their work. If children ask what you are doing, you may want to explain that you have come to see how the children are working.

Specific for Elementary

When you arrive at our classroom, you will be seated in an observation chair. Please observe quietly without speaking to the children.

You may find it difficult to focus your observation. It might be helpful to give attention to the following things:

THE CHILD

Independence
-initiates own activities
-terminates own activities
-evidences the ability to help oneself

Responsibility
-returns work to its proper place
-cares for the environment, maintenance
-cleans up after work or accident, and cares for equipment

Social Sense
-respects the work of others
-adapts to group needs
-participates in group activities

Individuality
-selects work to satisfy own needs
-works at own speed for as long as attention lasts
-follows own rate and development

THE TEACHER

-has an awareness of class dynamics
-has a sensitivity to individual children
-helps the children initiate work
-provides requested assistance
-demonstrates use of material
-maintains classroom materials

Read-Aloud Book Club, Austin Montessori School (Austin, TX)

Members of the book club can check out books to read to their children. Dues are used to purchase additional books

Austin Montessori School Read-Aloud Book Club

MEMBERSHIP IS NOW OPEN
JOIN THE CLUB!

PURPOSE

The Read-Aloud Book Club provides parents with convenient and inexpensive access to a large carefully chosen collection of books for reading aloud. These are books selected to:

---generate a high level of interest
---stimulate the exploration of values
---promote the development of thinking abilities
---support interesting language usage
---develop a sense of literary esthetic

BENEFITS

* Members have check out privileges from a special collection of books for parents to read aloud to their children.

* The books are housed in a special section of the Austin Montessori School Library for easy access by children.

* Books are conveniently sized and light weight paperbacks with covers reinforced inside and out with self-adhesive plastic.

* The collection is selected from books listed in Jim Trealese's *Reading Aloud*; William E. Russell's *Classics to Read Aloud to Your Children*; and the sequel *More Classics to Read Aloud to Your Children*; as well as *The New York Times Parents' Guide to the Best Books for Children*.

PROCEDURE

* Parent will request Read-Aloud Book Club packet, read through description and request 1st, 2nd, and 3rd choice. The packet should be returned within 3 days.

* The book checked out will be sent home with the child in a mailing envelope

* When a book is returned, another may be selected for at-home reading.

* Each book is checked out for a period of two weeks.

* At the end of the original check out period, an additional and final two week renewal period is granted upon request.

* After a grace period of seven days, a late fee is assessed for outstanding books.

* When a book is lost or damaged beyond normal wear, a repair or replacement charge is assessed for payment and a bill for payment is given to the club member.

* All "fines", book repair costs, or replacement monies must be paid in order for a member to keep club privileges.

MEMBERSHIP FEE

* An annual three dollar membership fee grants check out privileges for an entire school year.

* Membership dues are used to acquire books for the club.

* Funding shortages for book acquisition, shipment and preparation are paid by the school.

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MEMBERSHIP FORM

Student's Name:________________________________

Guide:____________________ Date:______________

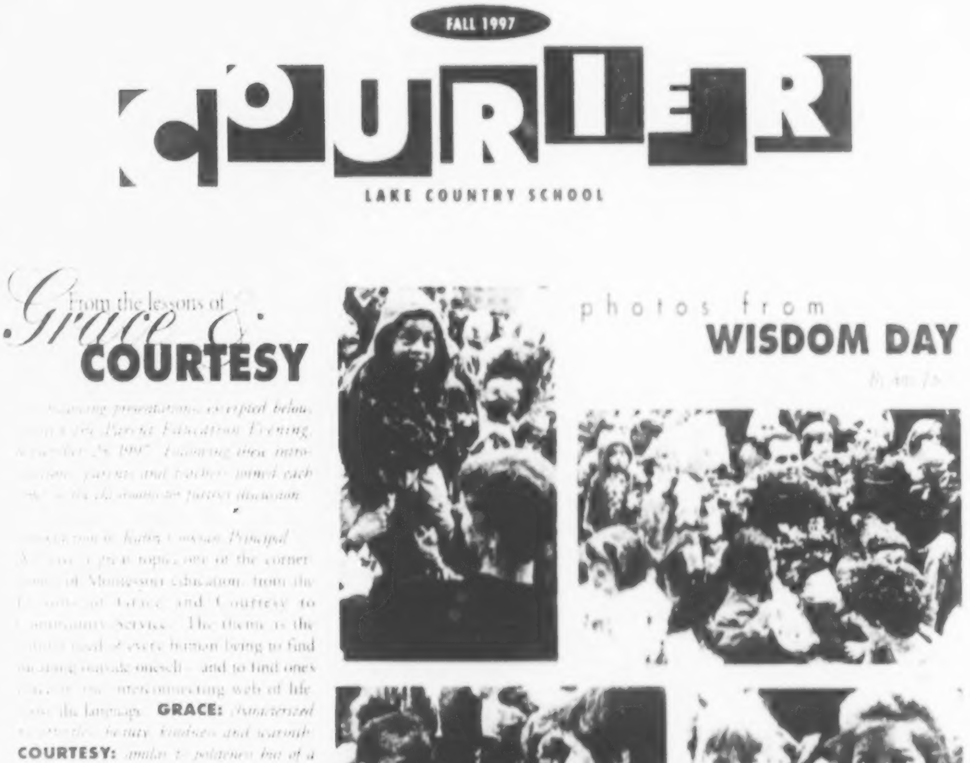
Area (s) of Reading Interest:________________________

____

Parent Signature:________________________________

Please Return To School With $3 Payment. Thank You.

School Newsletter, Lake Country School (Minneapolis, MN)



FALL 1997

COURIER

LAKE COUNTRY SCHOOL

From the lessons of *Grace &* COURTESY

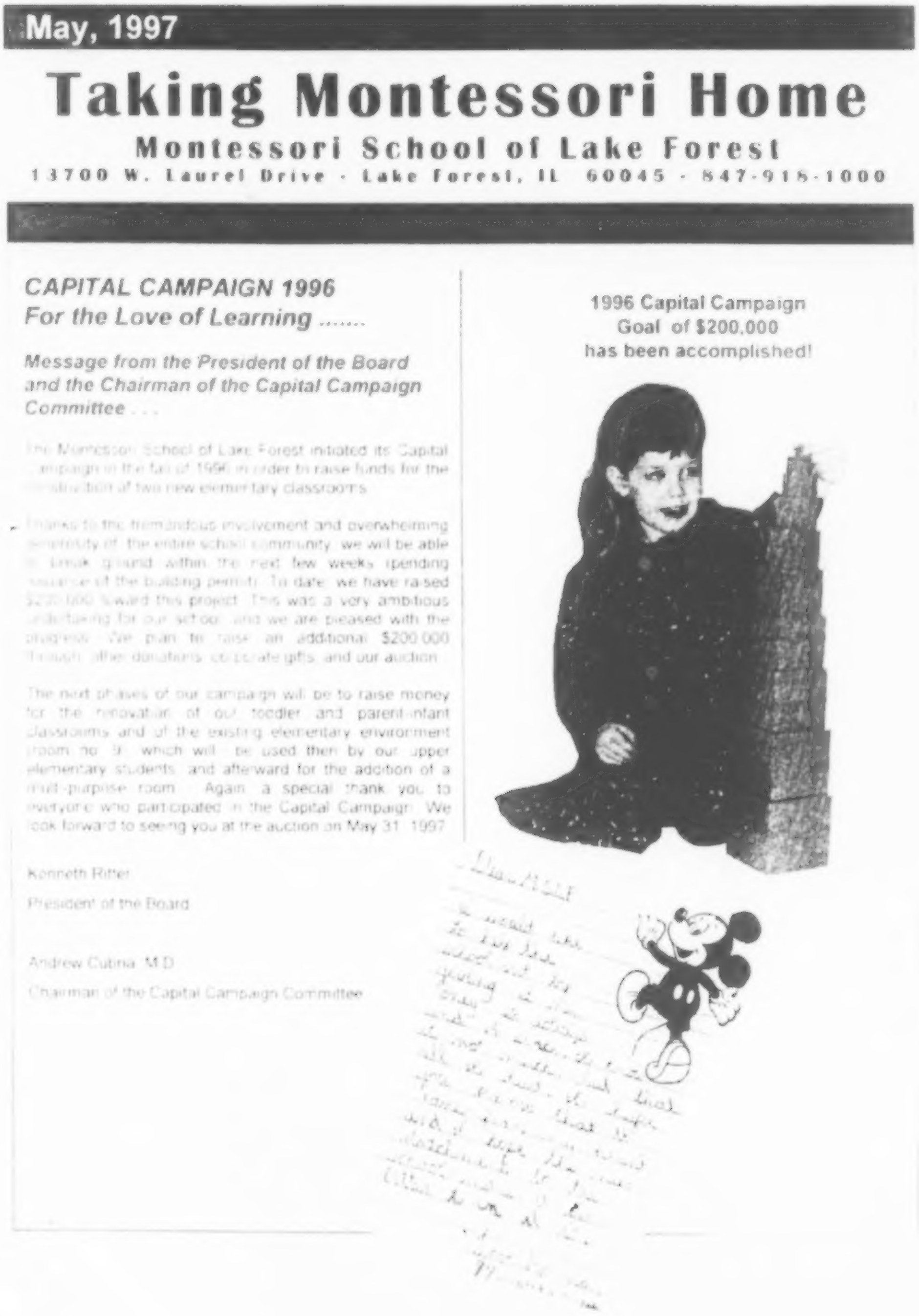
photos from WISDOM DAY

to COMMUNITY SERVICE

VOLUME 22 NUMBER 1

The school newsletter communicates the ongoing work of the school community and gives expression to the key principles of Montessori education.

School Newsletter, Montessori School of Lake Forest (IL)



May, 1997

Taking Montessori Home

Montessori School of Lake Forest
13700 W. Laurel Drive · Lake Forest, IL 60045 · 847-918-1000

CAPITAL CAMPAIGN 1996
For the Love of Learning ....

Message from the President of the Board and the Chairman of the Capital Campaign Committee . . .

The Montessori School of Lake Forest initiated its Capital Campaign in the fall of 1996 in order to raise funds for the construction of two new elementary classrooms.

Thanks to the tremendous involvement and overwhelming generosity of the entire school community, we will be able to break ground within the next few weeks (pending issuance of the building permit). To date, we have raised $200,000 toward this project. This was a very ambitious undertaking for our school, and we are pleased with the progress. We plan to raise an additional $200,000 through other donations, corporate gifts, and our auction.

The next phases of our campaign will be to raise money for the renovation of our toddler and parent-infant classrooms and of the existing elementary environment (room no. 9), which will be used then by our upper elementary students, and afterward for the addition of a multi-purpose room. Again, a special thank you to everyone who participated in the Capital Campaign. We look forward to seeing you at the auction on May 31, 1997.

Kenneth Ritter

President of the Board

Andrew Cubria, M.D.

Chairman of the Capital Campaign Committee

1996 Capital Campaign
Goal of $200,000
has been accomplished!

Dear MSLF

School Newsletter, Northwoods Montessori School (Atlanta, GA)

NORTHWOODS MONTESSORI

Winter, 1998 Community News Issue One

"IN MY OBSERVATION..." RAMBLES ON AND OFF CAMPUS

By Gail Borden, Director of Education

A recent crisp December morning found me in the school van with Janice and some of her Elementary students, headed for a small variety shop. "You're getting a morning off," one of the children observed. And, so I was. Off campus, but not away from the learning process; out of the office and classroom and into the "real world," as were they.

At the store, one of the students found a bag of what appeared to be the perfect round balloons for his science experiment. Upon careful examination, he and his friends decided to look further. The label and price tag indicated that they were made especially for helium, and cost more than the children were prepared to pay. After two more stops, we returned to campus with several things on the shopping list.

These frequent child-planned excursions into the community, "Goings Out," respond to the characteristics of the child of Elementary age and provide food no field trip or guest speaker can for the child's hungry mind. The intellect and the imagination must work together, Maria Montessori told us, fed with truth—truth obtained experientially, sensorially. In *To Educate the Human Potential*, we see the bold statement: "The child should love everything that he learns, for his mental and emotional growths are linked."

In last year's series of newslet

OBSERVATION - Continued on page 2

COSMIC EDUCATION—WHAT IS IT & WHAT DOES IT HAVE TO DO WITH GOING OUT?

What? Cosmic Education is the Montessorian's term for enhancing opportunities for a child's explorations. It is the way we integrate subject matter to form the Elementary Curriculum.

In the Elementary Curriculum the "Great Lessons" (The Creation, Life on Earth, and The Coming of Human Beings) are presented in story form from the general to the specific. Beginning with the global gives structure to the whole of information to be explored while offering freedom gives possibility for depth. Research projects integrate the development of skills and the exploration of subject areas in multi-age collaborative groups. Students thereby construct a widening view of the interconnectedness of things.

Why? This is the best way for children ages 6-12 years of age to learn what they really want to learn: a little bit about everything and everything they can about certain little bits.

It is in keeping with the Elementary child's desire to think BIG thoughts and do BIG work.

It responds to the child's developmental level in general and allows children to use their individual gifts, or intelligences, specifically.

We hope it results in an appreciation of the contributions of all creation towards meeting the child's needs. If so, it helps us accomplish our purpose, that of enhancing opportunities for the child's personal integration and appreciation of interdependence.

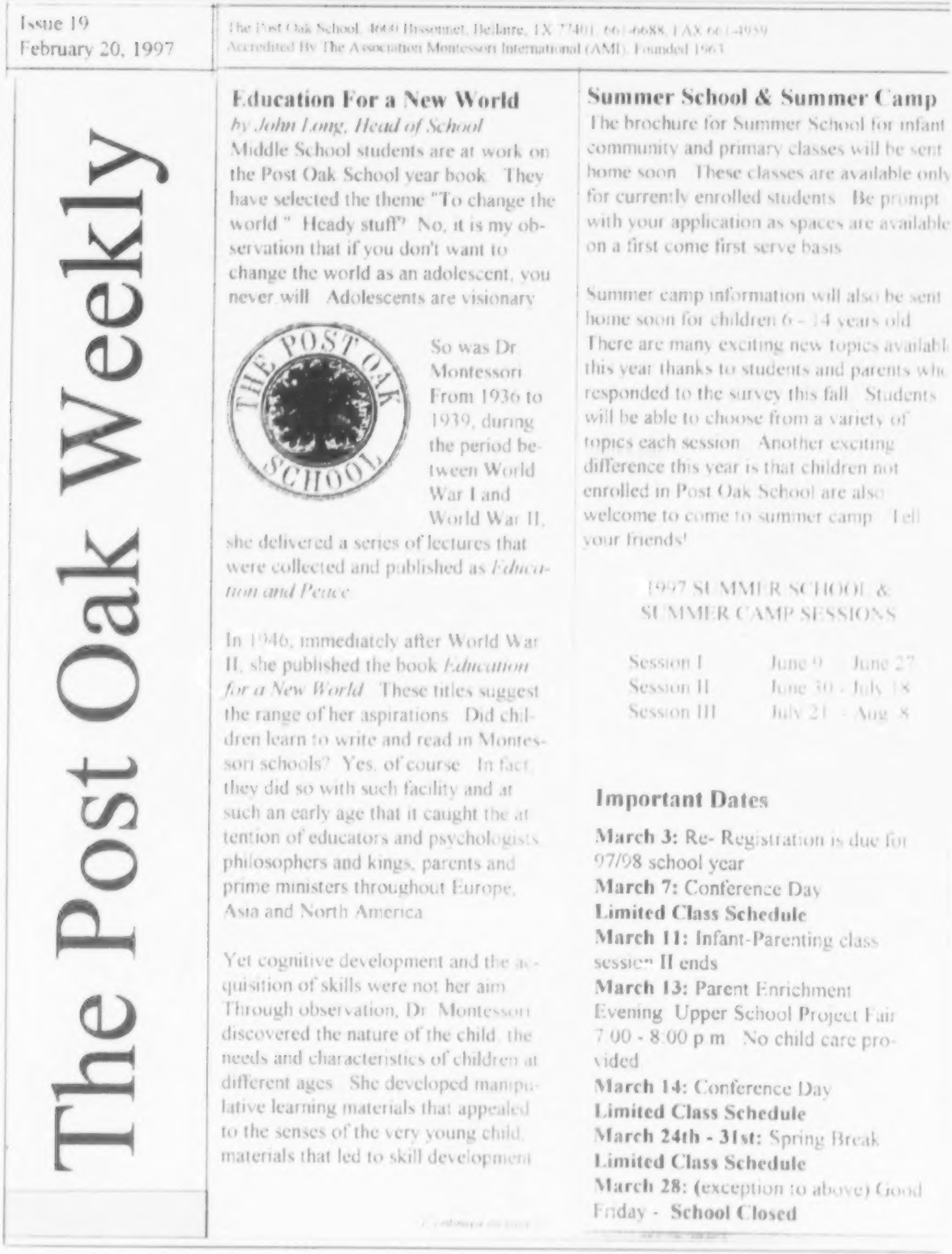
Who? Almost anyone and everyone becomes a learning resource as the children expand the information available in the classroom and go out into their communities. Laura Polk Lillard, explains this clearly in Chapter 7 of *Montessori Today*, where she illustrates the roles of Freedom and Responsibility.

"When Elementary children have shown that they are responsible in maintaining the classroom environment (keeping their work with care and working in harmony with others), they are each given a new freedom. This freedom comes as a surprise to adults and it is difficult for us to comprehend its full import for the children. It involves freedom beyond their classroom

Jared and Josh rush to board the van, accessible on campus every day and a necessary component of the spontaneous "Going Out" program.

COSMIC EDUCATION- Cont. on page 2

Weekly Bulletin, The Post Oak School (Bellaire, TX)



Issue 19
February 20, 1997

The Post Oak School, 4600 Bissonnet, Bellaire, TX 77401, 661-6688, FAX 661-4959
Accredited By The Association Montessori International (AMI), Founded 1963

The Post Oak Weekly

Education For a New World

by John Long, Head of School

Middle School students are at work on the Post Oak School year book. They have selected the theme "To change the world." Heady stuff? No, it is my observation that if you don't want to change the world as an adolescent, you never will. Adolescents are visionary.

So was Dr Montessori. From 1936 to 1939, during the period between World War I and World War II, she delivered a series of lectures that were collected and published as *Education and Peace*.

In 1946, immediately after World War II, she published the book *Education for a New World*. These titles suggest the range of her aspirations. Did children learn to write and read in Montessori schools? Yes, of course. In fact, they did so with such facility and at such an early age that it caught the attention of educators and psychologists, philosophers and kings, parents and prime ministers throughout Europe, Asia and North America.

Yet cognitive development and the acquisition of skills were not her aim. Through observation, Dr. Montessori discovered the nature of the child, the needs and characteristics of children at different ages. She developed manipulative learning materials that appealed to the senses of the very young child, materials that led to skill development.

(Continued on [illegible])

Summer School & Summer Camp

The brochure for Summer School for infant community and primary classes will be sent home soon. These classes are available only for currently enrolled students. Be prompt with your application as spaces are available on a first come first serve basis.

Summer camp information will also be sent home soon for children 6 - 14 years old. There are many exciting new topics available this year thanks to students and parents who responded to the survey this fall. Students will be able to choose from a variety of topics each session. Another exciting difference this year is that children not enrolled in Post Oak School are also welcome to come to summer camp. Tell your friends!

1997 SUMMER SCHOOL &
SUMMER CAMP SESSIONS

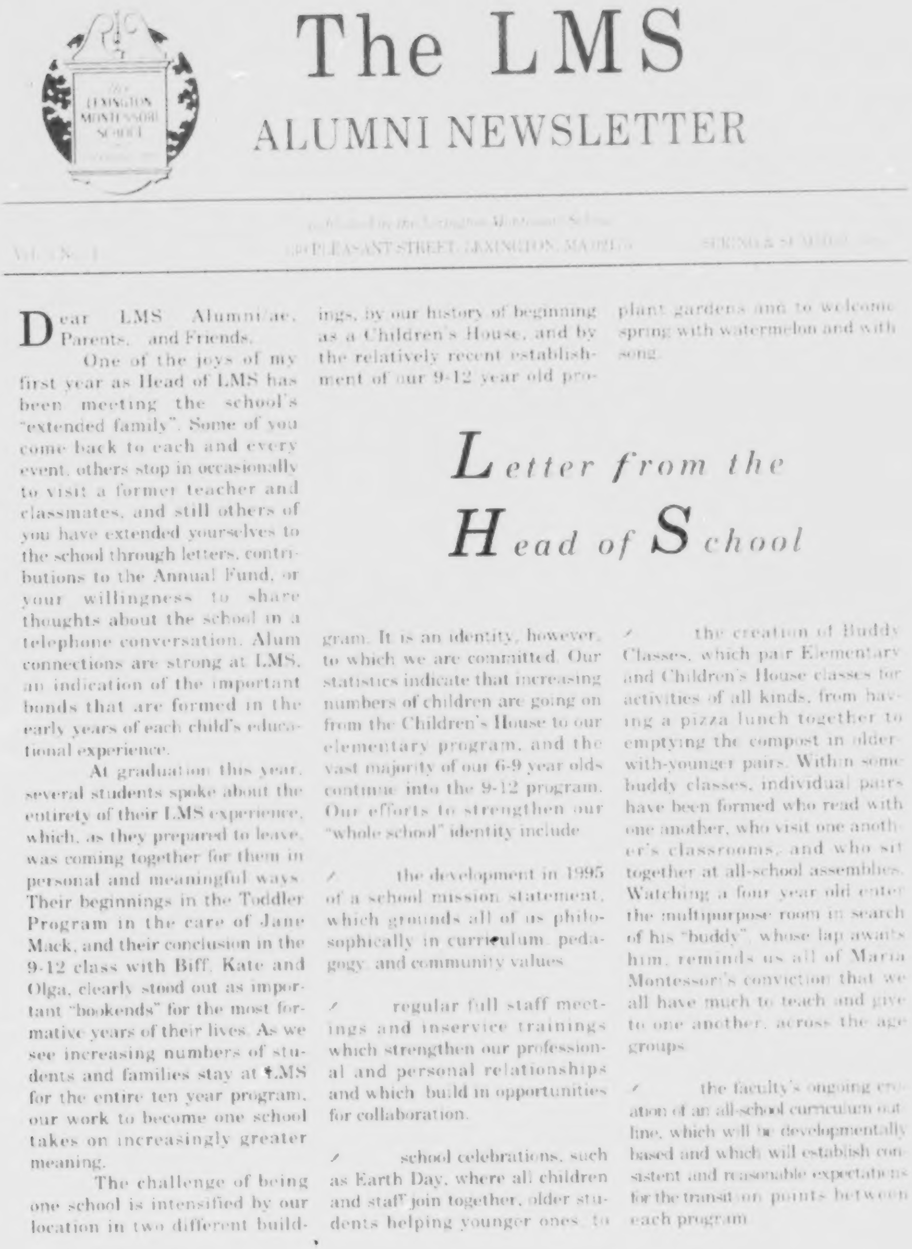
Session I	June 9 - June 27
Session II	June 30 - July 18
Session III	July 21 - Aug. 8

Important Dates

March 3: Re- Registration is due for 97/98 school year
March 7: Conference Day
Limited Class Schedule
March 11: Infant-Parenting class session II ends
March 13: Parent Enrichment Evening. Upper School Project Fair 7:00 - 8:00 p.m. No child care provided
March 14: Conference Day
Limited Class Schedule
March 24th - 31st: Spring Break
Limited Class Schedule
March 28: (exception to above) Good Friday - **School Closed**

The weekly bulletin promotes frequent communication with parents and provides updates about current events in the school. An alumni newsletter fosters a continued relationship with families who have been a part of the school community.

Alumni Newsletter, Lexington Montessori School (Lexington, MA)



The LMS
ALUMNI NEWSLETTER

published by the Lexington Montessori School
Vol. 1 No. 1 | 130 PLEASANT STREET, LEXINGTON, MA 02173 | SPRING & SUMMER [illegible]

Letter from the Head of School

Dear LMS Alumni/ae, Parents, and Friends,

One of the joys of my first year as Head of LMS has been meeting the school's "extended family". Some of you come back to each and every event, others stop in occasionally to visit a former teacher and classmates, and still others of you have extended yourselves to the school through letters, contributions to the Annual Fund, or your willingness to share thoughts about the school in a telephone conversation. Alum connections are strong at LMS, an indication of the important bonds that are formed in the early years of each child's educational experience.

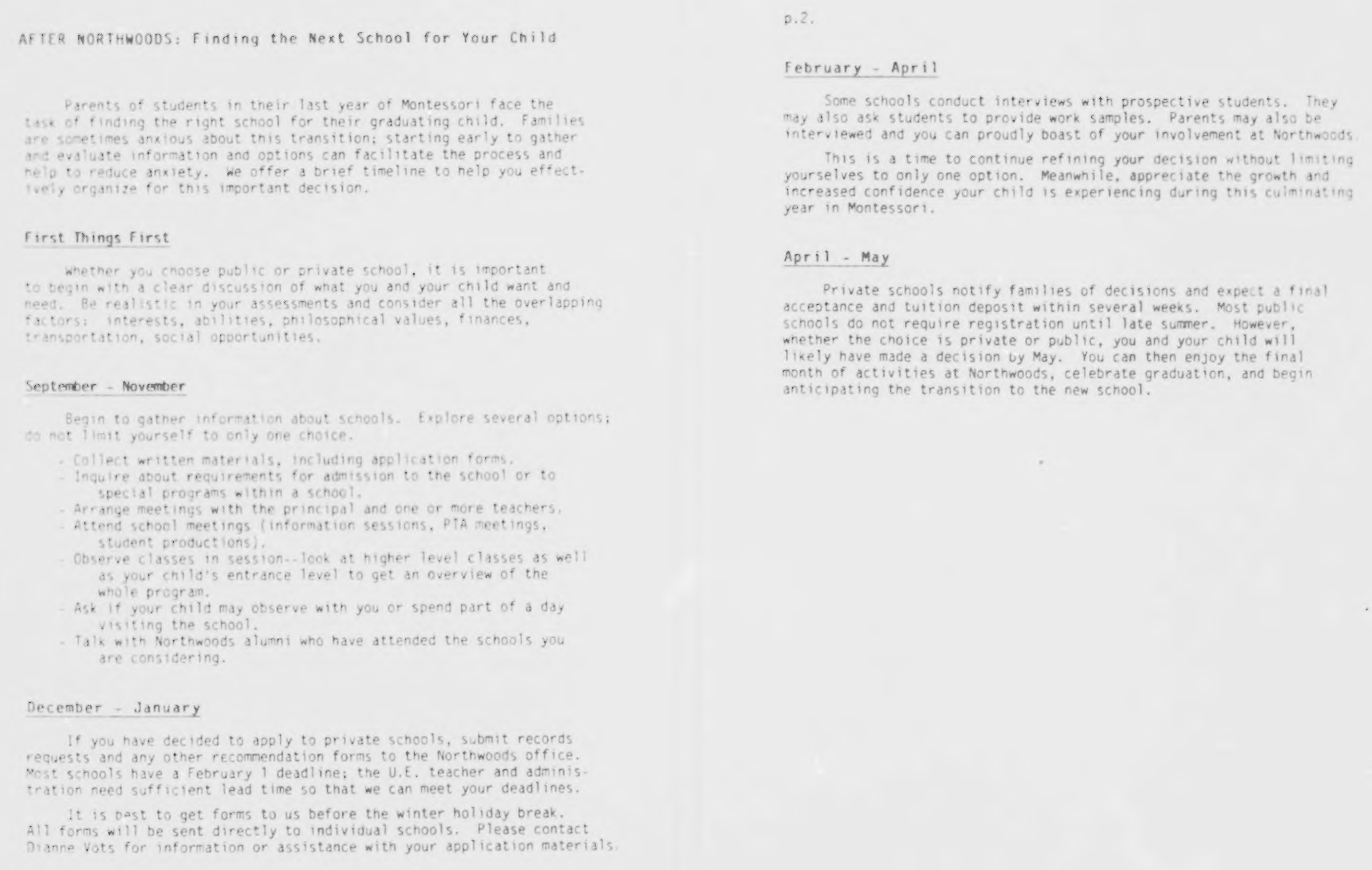
At graduation this year, several students spoke about the entirety of their LMS experience, which, as they prepared to leave, was coming together for them in personal and meaningful ways. Their beginnings in the Toddler Program in the care of Jane Mack, and their conclusion in the 9-12 class with Biff, Kate and Olga, clearly stood out as important "bookends" for the most formative years of their lives. As we see increasing numbers of students and families stay at LMS for the entire ten year program, our work to become one school takes on increasingly greater meaning.

The challenge of being one school is intensified by our location in two different buildings, by our history of beginning as a Children's House, and by the relatively recent establishment of our 9-12 year old program. It is an identity, however, to which we are committed. Our statistics indicate that increasing numbers of children are going on from the Children's House to our elementary program, and the vast majority of our 6-9 year olds continue into the 9-12 program. Our efforts to strengthen our "whole school" identity include

- ✓ the development in 1995 of a school mission statement, which grounds all of us philosophically in curriculum, pedagogy, and community values
- ✓ regular full staff meetings and inservice trainings which strengthen our professional and personal relationships and which build in opportunities for collaboration.
- ✓ school celebrations, such as Earth Day, where all children and staff join together, older students helping younger ones to plant gardens and to welcome spring with watermelon and with song.
- ✓ the creation of Buddy Classes, which pair Elementary and Children's House classes for activities of all kinds, from having a pizza lunch together to emptying the compost in older-with-younger pairs. Within some buddy classes, individual pairs have been formed who read with one another, who visit one another's classrooms, and who sit together at all-school assemblies. Watching a four year old enter the multipurpose room in search of his "buddy", whose lap awaits him, reminds us all of Maria Montessori's conviction that we all have much to teach and give to one another, across the age groups.
- ✓ the faculty's ongoing creation of an all-school curriculum outline, which will be developmentally based and which will establish consistent and reasonable expectations for the transition points between each program.

The weekly bulletin promotes frequent communication with parents and provides updates about current events in the school. An alumni newsletter fosters a continued relationship with families who have been a part of the school community.

Parent Handout, Northwoods Montessori School (Atlanta, GA)



AFTER NORTHWOODS: Finding the Next School for Your Child

Parents of students in their last year of Montessori face the task of finding the right school for their graduating child. Families are sometimes anxious about this transition; starting early to gather and evaluate information and options can facilitate the process and help to reduce anxiety. We offer a brief timeline to help you effectively organize for this important decision.

First Things First

Whether you choose public or private school, it is important to begin with a clear discussion of what you and your child want and need. Be realistic in your assessments and consider all the overlapping factors: interests, abilities, philosophical values, finances, transportation, social opportunities.

September - November

Begin to gather information about schools. Explore several options; do not limit yourself to only one choice.

- Collect written materials, including application forms.
- Inquire about requirements for admission to the school or to special programs within a school.
- Arrange meetings with the principal and one or more teachers.
- Attend school meetings (information sessions, PTA meetings, student productions).
- Observe classes in session--look at higher level classes as well as your child's entrance level to get an overview of the whole program.
- Ask if your child may observe with you or spend part of a day visiting the school.
- Talk with Northwoods alumni who have attended the schools you are considering.

December - January

If you have decided to apply to private schools, submit records requests and any other recommendation forms to the Northwoods office. Most schools have a February 1 deadline; the U.E. teacher and administration need sufficient lead time so that we can meet your deadlines.

It is best to get forms to us before the winter holiday break. All forms will be sent directly to individual schools. Please contact Dianne Vots for information or assistance with your application materials.

p.2.

February - April

Some schools conduct interviews with prospective students. They may also ask students to provide work samples. Parents may also be interviewed and you can proudly boast of your involvement at Northwoods.

This is a time to continue refining your decision without limiting yourselves to only one option. Meanwhile, appreciate the growth and increased confidence your child is experiencing during this culminating year in Montessori.

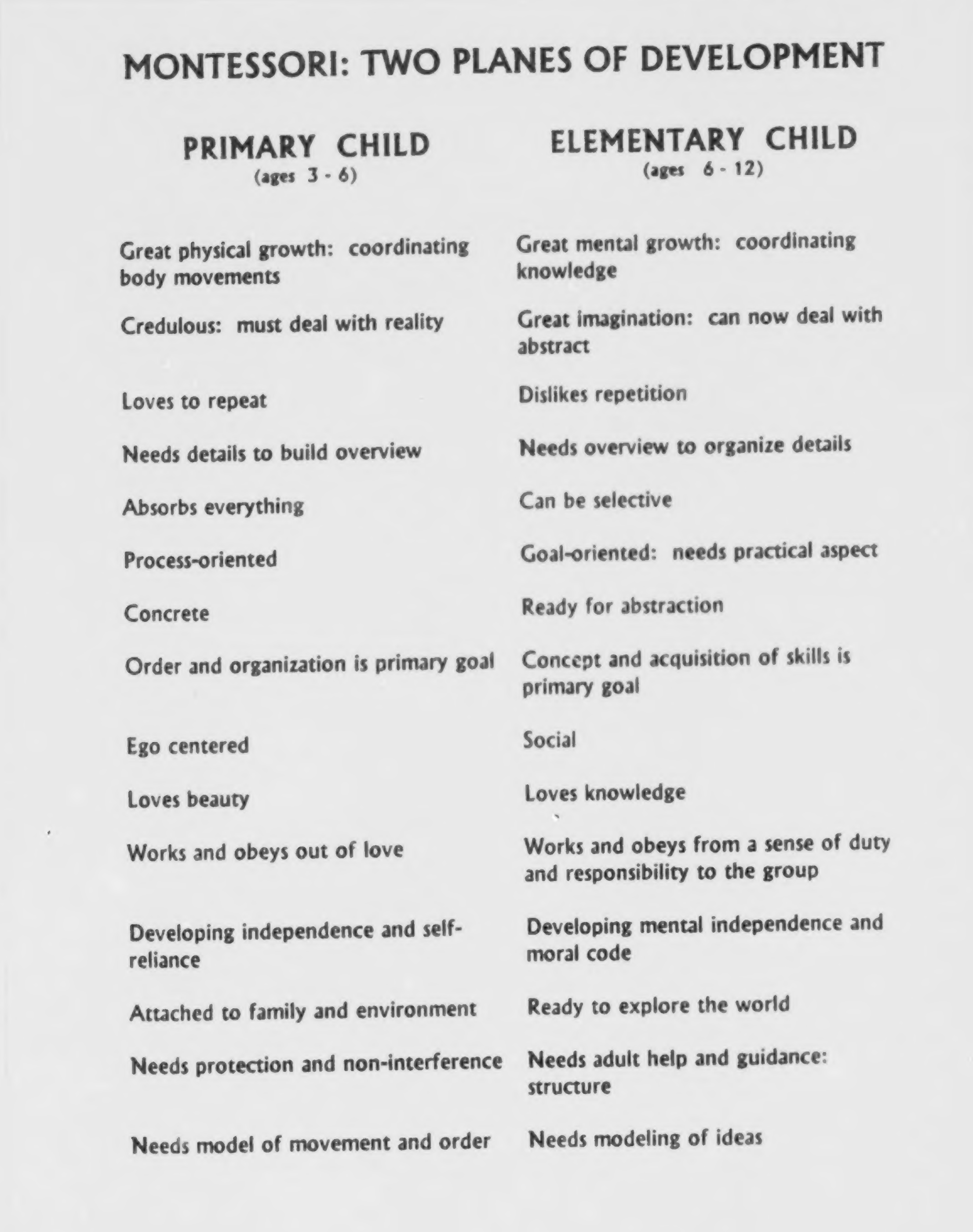
April - May

Private schools notify families of decisions and expect a final acceptance and tuition deposit within several weeks. Most public schools do not require registration until late summer. However, whether the choice is private or public, you and your child will likely have made a decision by May. You can then enjoy the final month of activities at Northwoods, celebrate graduation, and begin anticipating the transition to the new school.

A handout prepared by the school to assist parents whose children will be transitioning to another school after graduation.

BEST COPY AVAILABLE

Parent Handout, Henson Valley Montessori School (Temple Hills, MD)



MONTESSORI: TWO PLANES OF DEVELOPMENT

PRIMARY CHILD (ages 3 - 6)	**ELEMENTARY CHILD** (ages 6 - 12)
Great physical growth: coordinating body movements	Great mental growth: coordinating knowledge
Credulous: must deal with reality	Great imagination: can now deal with abstract
Loves to repeat	Dislikes repetition
Needs details to build overview	Needs overview to organize details
Absorbs everything	Can be selective
Process-oriented	Goal-oriented: needs practical aspect
Concrete	Ready for abstraction
Order and organization is primary goal	Concept and acquisition of skills is primary goal
Ego centered	Social
Loves beauty	Loves knowledge
Works and obeys out of love	Works and obeys from a sense of duty and responsibility to the group
Developing independence and self-reliance	Developing mental independence and moral code
Attached to family and environment	Ready to explore the world
Needs protection and non-interference	Needs adult help and guidance: structure
Needs model of movement and order	Needs modeling of ideas

A simple handout can help parents remember key points of a teacher's presentation or group discussion. This one was prepared for a parent meeting to discuss the transition from preschool to elementary.

Parent Handout on Home Responsibility

Working Towards Responsibility

by Sandra Westcott

As children grow, they should become more responsible - more willing to help, more aware of the needs of others, more able to manage tasks on their own. By eighteen, parents want children to know both what needs to be done to handle everyday life and how to accomplish these jobs. Nurturing a responsible attitude is the first item on the "parent job description". How do we begin? Can it be enjoyable? What responsibilities can we expect children to assume at different ages?

Always bear in mind your child's stage of development when you ask him to assume a responsibility.

- **The interests of young children, from birth to age 6 focus on self care leading to physical independence.**
- **During the 6-12 years, children are interested in decision-making which leads to mental independence.**
- **During adolescence, financial independence becomes the chief concern.**

Naturally, after your child has learned a particular skill, it becomes a habit of everyday living. That's why the following list of suggested responsibilities is cumulative.

Be sure to talk from time to time with your children about the chores they consider interesting and fun, and those they find boring and disagreeable. Use your child's birthday as an excuse to schedule the discussion. You might make a list together of jobs they'd like to try and jobs they want to avoid. The results may surprise you! The jobs your children want might be harder and more time-consuming than the ones they hate. Why? Certain jobs seem more interesting or challenging. Maybe they involve real adult responsibilities. By allowing your children to try a challenging job, you give them the chance to feel the same pride and self-confidence we get from doing satisfying work.

What tasks fill the "Chores I Hate" column? Picking up dirty clothes, weeding the garden, making the bed, taking out the garbage? They may be boring, but dull jobs are a part of life, too. Point out the positive results of your children's assistance. "Bring down your laundry so you'll have clean clothes tomorrow." "If we finish the housework together on Saturday morning, we'll have time to go swimming in the afternoon." Nobody likes to work alone. By including one of your children in a task you have chosen, you are spending time together, which is much more fun for everyone! Remember to notice and praise your child's completion of a job, even if he only does it occasionally at first.

Never expect a standard of orderliness or cleanliness from your child that you would not demand from yourself. It's good to examine periodically your own standards. Make sure you don't ask for the impossible! Provide the means required for your child to complete the job. For instance, putting toys on shelves is only possible if there is enough space on the shelves for all the toys.

Keep your child's schedule in mind when assigning chores. Make your system flexible enough to work around sport practices, music lessons, and outdoor play. Don't ask your child to do so many jobs he feels overwhelmed. Remember most children need to have tasks broken down into steps. "Clean your room" is ambiguous. What does it involve? Define your tasks together. Accept the fact that you will probably have to work alongside your child if you want the job done your way.

Sandra Westcott's parent handout on building responsibility provides sensible advice for supporting Montessori principles at home.

Home Responsibilities

The following list was compiled by parents and teachers. You may add to it as you try various tasks and see that they are appropriate for a particular age group.

For Two and Three-Year Olds

Be sure you supply tools children can handle before asking them to do the job.

- *Pick up toys and put them away in the correct place.*
- *Put books on a shelf, magazines in a rack, and newspapers in the recycling area.*
- *Sweep the floor with a child-sized broom.*
- *Set the table.*
- *Clean under the table after meals with a dustpan and brush.*
- *Choose between two different foods for breakfast and lunch.*
- *Carry his own dish and silverware to the kitchen after meals. Scrape the plate. Place it on the counter or in the dishwasher.*
- *Learn to use the toilet.*
- *Brush teeth, wash and dry hands, and brush hair. You will need to supply a sturdy stool in the bathroom so your child can see himself in the mirror.*
- *Undress himself. Dress himself with some help.*
- *Mops up spills or accidents.*
- *Put away boxes or cans from the grocery store on lower shelves.*
- *Accompany you to the recycling center and carry items from the car to the various bins.*

For Four and Five-Year Olds

This is a good age to begin using a goal chart. Choose jobs together and put them on the chart. When the jobs are done, the child and parents enjoy a special treat together.

- *Help with grocery shopping and suggest foods to purchase.*
- *Polish shoes.*
- *Feed and water pets.*
- *Assist with raking, weeding and planting.*
- *Help make his bed.*
- *Help vacuum with electric broom or lightweight vacuum.*
- *Help fill and empty the dishwasher.*
- *Dust furniture.*
- *Begin some "cooking", such as pouring his own drink, spreading peanut butter on bread, pouring cereal, adding topping to gelatin or ice cream, tearing up lettuce for a salad, adding certain ingredients to a dish mom or dad is cooking, holding the electric mixer to mash potatoes or combine ingredients for a cake, prepare plates for the family dinner, clean up afterwards.*
- *Bring in the mail.*
- *Polish silver, help polish the car.*
- *Sharpen pencils.*
- *Dressing on his own including choosing an outfit for the day.*
- *Learn to tie his shoes.*
- *Scrubbing the sink, toilet and bathtub.*
- *Cleaning mirrors and windows.*
- *Separate the wash into various loads.*
- *Folding clothes and putting them away.*
- *Learn to answer the telephone and how to dial emergency numbers.*
- *Help clean out the interior of the car.*
- *Take out the garbage.*
- *Begin learning social skills: Sharing toys with playmates, asking before going out to play, etc. The child should be able to play for short periods without adult attention.*
- *Begin to suggest family activities he would like to be taken from the "entertainment fund".*
- *Begin handling money - paying for small purchases in cash and receiving change.*

For Six and Seven-Year Olds

- *Water house plants, the lawn and outdoor flowers.*
- *Sweep and hose off the patio or deck.*
- *Begin using sharp knives to peel vegetables and the stove and microwave to prepare simple food.*
- *Carry in the grocery sacks.*
- *Prepare his own school lunch.*
- *Gather wood for the fireplace.*
- *Take his dog for a walk (if the dog is not too big).*
- *Give the dog a bath.*
- *Be responsible for bandaging minor injuries.*
- *Wash out the trash cans.*
- *Wash walls; mop floors.*
- *Straighten or clean the silverware drawer.*
- *Hang his own clothes in the closet.*
- *Do simple ironing.*
- *Leave the bathroom in order; hang up towels, put dirty clothes in hamper, etc.*
- *Care for his bicycle, including locking it when not in use.*
- *Care for outdoor play equipment.*
- *Use an alarm clock to get himself up in the morning. Go to bed at night on his own.*
- *Carry lunch money and notes to school.*
- *Run errands in the neighborhood when parents ask.*
- *Take telephone messages and write them down.*

For Eight and Nine-Year Olds

- *Mop or buff the wooden, tile or vinyl flooring.*
- *Wax the furniture.*
- *Clean miniblinds.*
- *Straighten his own closet and drawers.*
- *Run his own bath water.*
- *Fold his blankets.*
- *Perform minor repairs to clothing, such as replacing buttons or sewing rips in clothing.*
- *Scoop up animal waste in the yard or house, including cleaning the cat box.*
- *Shop for and select his own clothing and shoes along with a parent.*
- *Change to play clothes after school without being asked.*
- *Begin to read recipes and cook occasionally for the family.*

Parent Handout on Home Responsibility (continued)

- *Cut flowers and make a centerpiece.*
- *Pick fruit off trees or bushes.*
- *Build a campfire.*
- *Prepare food for cooking outdoors, such as hamburgers or shishkebobs.*
- *Paint a fence or shelf.*
- *Begin to write letters and thank-you notes.*
- *Feed the baby occasionally.*
- *Watch younger siblings briefly as long as parents are available. For example, playing a game with a sibling while dad mows the lawn and mom is grocery shopping.*
- *Know how to cross streets safely: Do so without assistance.*

For Ten and Eleven-Year Olds

- *Strip the bed and replace the dirty sheets with clean ones.*
- *Operate the washer and dryer including measuring of detergent, fabric softener and bleach.*
- *Buy groceries using a list; choose more economical brands by using comparison shopping.*
- *Keep track of his own schedule including regularly scheduled practices, doctor and dental appointments, etc.*
- *Receive and answer mail addressed to him.*
- *Pouring and preparing tea, coffee, and cold drinks.*
- *Waiting on guests.*
- *Plan his own parties.*
- *Know simple first aid.*
- *Learn to use a sewing machine.*
- *Learn about bank accounts. Begin savings account.*
- *Wash the family car.*

For Eleven and Twelve -Year Olds

- *Begin earning his own money by mowing lawns, babysitting, etc.*
- *Learn safety rules for staying at home alone.*
- *Learn to take public transportation such as light rail or bus.*
- *Pack his own suitcase for overnight trips.*
- *Take responsibility for his own hobbies.*
- *Learn to handle himself safely and politely when in public places alone or with peers.*
- *Join organizations and take some responsibility for leadership.*
- *Dress and undress younger siblings and put them to bed.*
- *Clean the pool and pool deck.*
- *Run his own errands when reasonable.*
- *Mow the lawn and learn lawn mower care and maintenance.*
- *Work along with parents during home repair or construction projects.*
- *Clean the oven and refrigerator.*
- *Set his own schedule to manage homework and instrument practice.*
- *Learn to pump gas and add oil to the car.*
- *Purchase his own treats.*

For Adolescents

- *Be able to determine his own bedtime.*
- *Be able to discuss and decide along with parents his curfew for evening gatherings.*
- *Take complete responsibility for preparing a family meal.*
- *Learn and understand how to maintain good health through exercise, adequate rest, weight control, eating nutritious food, and annual check-ups.*
- *Begin to anticipate the needs of family members and friends and offer to help.*
- *Understand and accept his capabilities and limitations.*
- *Respect himself and take responsibility for his decisions.*
- *Demonstrate loyalty, honesty, and respect to others.*

If you are patient with your children, add responsibility as they become developmentally ready for it and express your appreciation for their involvement with the family, you will earn their gratitude when they are young adults. All parents want their children to become independent, competent adults. Using these suggestions will help!

Attrition Survey, Ruffing Montessori School East (Cleveland Heights, OH)

Ruffing Montessori School
Attrition Survey
(For Students Leaving During or After 1997-98 School Year)

Hello, may I please speak with _______________? I am calling from Independent School Management. We are conducting a survey for Ruffing Montessori School on why families decided not to re-enroll their children for this school year. We are a consulting firm for private-independent schools, located in Wilmington, Delaware. This survey is strictly confidential and only summary information, nothing that would identify your individual responses, is given to the school. Do you have about 5 minutes to complete the survey with me?

1. From the information given to me by the school, your child, __________________, left after the end of __________grade. Is this correct? . . ☐1 Yes ☐2 No

2. Which family member expressed a desire to leave the school?

☐1 1. Mother ☐2 2. Father ☐3 3. Student
☐4 Other: ____

3. What percentage of the decision not to return to Ruffing Montessori School was made by each family member?

Mother . . . . ______%
Student . . . . ______%
Father . . . . ______%
Other: . . . . ________ ______%

4. Next, I'm going to read a list of various aspects of Ruffing Montessori School one at a time. Please rate each aspect as it influenced your family in your decision not to re-enroll. The scale is from 1-5 and is as follows:

	Strong negative factor	Moderate Negative factor	Neutral factor	Moderate positive factor	Strong positive factor	Don't know
Academic challenge	☐1	☐2	☐3	☐4	☐5	☐6
Class size	☐1	☐2	☐3	☐4	☐5	☐6
School size	☐1	☐2	☐3	☐4	☐5	☐6
The Montessori philosophy	☐1	☐2	☐3	☐4	☐5	☐6
Quality of faculty	☐1	☐2	☐3	☐4	☐5	☐6
Caring and concern of faculty	☐1	☐2	☐3	☐4	☐5	☐6
Individual attention	☐1	☐2	☐3	☐4	☐5	☐6
Administration	☐1	☐2	☐3	☐4	☐5	☐6
Diversity of staff	☐1	☐2	☐3	☐4	☐5	☐6
Diversity of student body	☐1	☐2	☐3	☐4	☐5	☐6
Discipline standards	☐1	☐2	☐3	☐4	☐5	☐6
Extended day program	☐1	☐2	☐3	☐4	☐5	☐6
School environment (caring, sense of community)	☐1	☐2	☐3	☐4	☐5	☐6

This telephone survey was designed and conducted for Ruffing by ISM (Independent School Management, Inc.), 1316 North Union St., Wilmington, DE 19806, (302) 656-4944, ism@isminc.com.

Attrition Survey, Ruffing Montessori School East (continued)

	Strong negative factor	Moderate Negative factor	Neutral factor	Moderate positive factor	Strong positive factor	Don't know
Safety of environment	☐1	☐2	☐3	☐4	☐5	☐6
Extracurricular activities	☐1	☐2	☐3	☐4	☐5	☐6
Social opportunities for students	☐1	☐2	☐3	☐4	☐5	☐6
Leadership opportunities for students	☐1	☐2	☐3	☐4	☐5	☐6
Transportation	☐1	☐2	☐3	☐4	☐5	☐6
Convenience of location	☐1	☐2	☐3	☐4	☐5	☐6
Campus and facilities	☐1	☐2	☐3	☐4	☐5	☐6
School's reputation as compared to other area schools	☐1	☐2	☐3	☐4	☐5	☐6
Communication with parents	☐1	☐2	☐3	☐4	☐5	☐6
Parents' perception of value received for tuition charged	☐1	☐2	☐3	☐4	☐5	☐6
Affordability of tuition	☐1	☐2	☐3	☐4	☐5	☐6

5. What would you say were the major factors in the decision not to re-enroll at Ruffing Montessori School? (Elaborate on areas mentioned above and give any others)

6a. Did you apply for Financial Aid?

☐1 Yes ☐2 No

6b. Was Financial Aid offered to you?

☐1 Yes ☐2 No

6c. Hypothetically speaking, would you have enrolled if your child received a full grant?

☐1 Yes ☐2 No ☐3 Uncertain

7. What do you see as the two greatest strengths of Ruffing Montessori?

8. What do you see as the two greatest weaknesses?

9. What type of school is your child attending during the 1998-99 school year?

☐1 Public ☐2 Private-parochial ☐3 Private -independent
☐4 Other

10. Would you tell me the name of the school?

11. What aspects of this school were the major factors in your family's decision to enroll your child there?

12. What is your opinion of your local public school system?

☐1 Excellent ☐2 Good ☐3 Fair ☐4 Poor ☐5 Don't know

13. Do you have any additional comments concerning Ruffing Montessori?

Thank you very much for your time. We wish your child the best during the coming school year.

Parent Organization, Tempe Montessori School (Mesa, AZ)

This parent organization document, reprinted from NAMTA's 1988 operations handbook, is still an excellent example of how a parent organization or association can be structured.

TEMPE MONTESSORI PARENT ORGANIZATION

PURPOSE

The Tempe Montessori Parent Organization (TEMPO) was started in 1985-86 by a group of parents as a support group to the staff, teachers, and administration of Tempe Montessori School. The organization is to be a vehicle through which parents have the opportunity to become an active part of the school community. The children benefit by seeing their parents "caring through action" about the total school environment. The staff benefits from the extra support, both concrete and in spirit given by the parents. The parents have the opportunity to become truly involved in their child's education. Hopefully a true sense of community is the result.

GOALS

1. To provide a means through which parents can meet each other and work together with staff and students for the benefit of all children.
2. To raise monies through fundraising activities that will be used to enhance the school environment to the benefit of all children.
3. To provide a means through which parents can meet and get to know each other better.

MEMBERSHIP

All parents who have children currently enrolled in Tempe Montessori School (and Grandparents) are invited to be a part of TEMPO. There are many ways to give of your time. At the beginning of each year a volunteer interest form is sent out on which you can indicate the manner in which you would like to become a part of TEMPO.

OFFICERS

The officers of TEMPO are as follows:

1. President
2. Vice-President
3. Secretary
4. Treasurer

Standing Committee Chairpersons:

1. Fundraising
    a. Rummage Sale
    b. End of the Year Raffle
2. Social
3. Newsletter
4. Classroom and Building & Grounds Volunteers

All of the above officers and chairpersons are elected at the end of the year Ice Cream Social by the parents of Tempe Montessori School.

MEETINGS

Meeting of the officers and standing committee chairpersons are held as necessary. Two total membership meetings will occur each year at the Open House and the End of the Year Ice Cream Social. Officer and committee meetings will be announced and are open to all parents to attend.

During the school year the major communication vehicle regarding TEMPO affairs is the TEMPO Newsletter.

FUNDRAISING

a. Rummage Sale

-to organize the various aspects of the sale: publicity, collection of rummage items, set-up, money collection, table-monitoring and clean-up.

b. Raffle

-to put together the list of raffle prizes
-to organize ticket distribution and collection
-to organize the drawing for the raffle.

SOCIAL

a. Organization of the major parent social event for the year.

b. Help in recruiting volunteers for other school social events:

the Christmas Program

the End of the Year Ice Cream Social

the Elementary School Opera

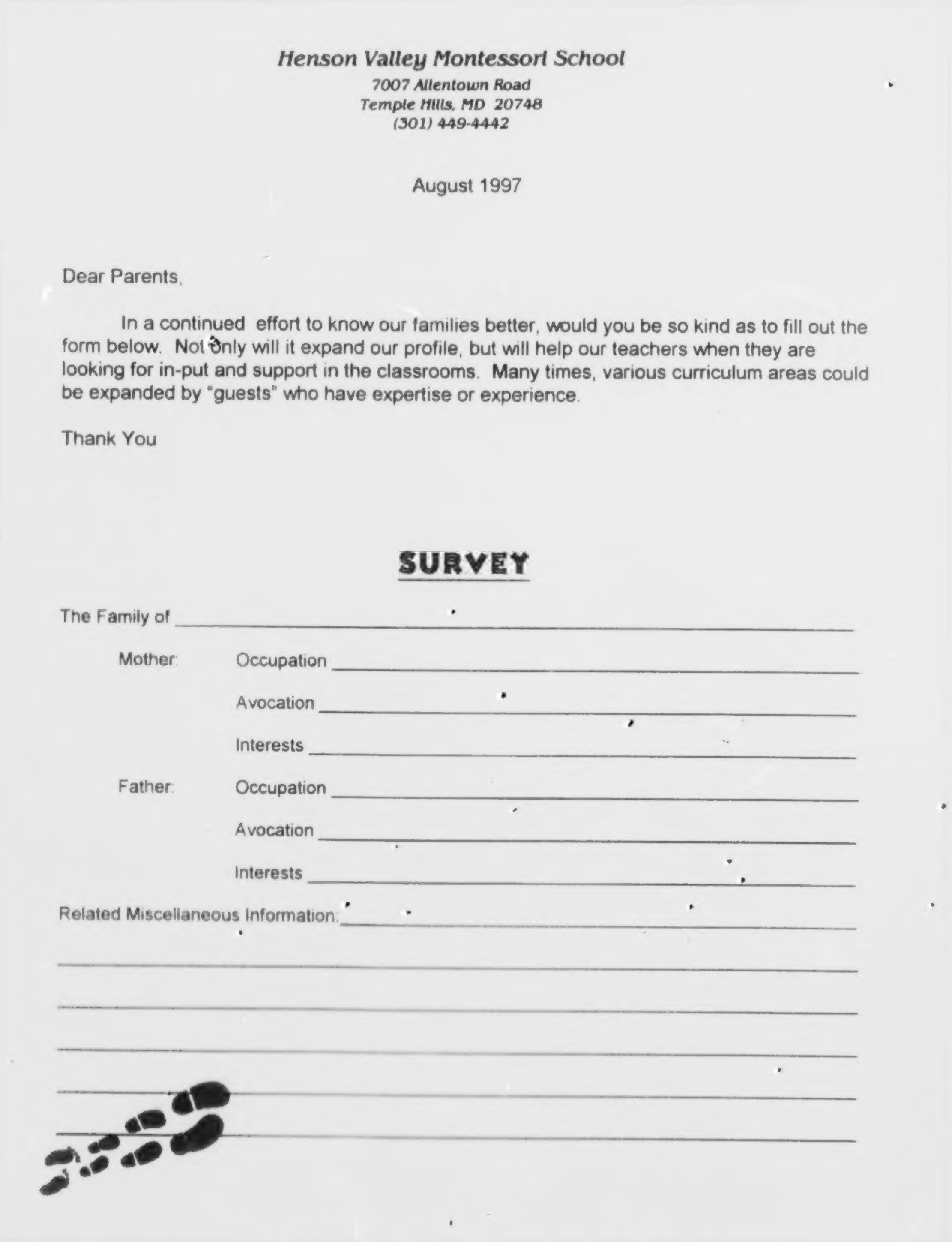
NEWSLETTER

-to collect the necessary news for the TEMPO Newsletter
-to organize the typing, lay-out and distribution of the newsletter.

CLASSROOM AND BUILDING & GROUNDS VOLUNTEERS

-to keep an updated list of all the parents' stated volunteer interests
-to coordinate the volunteers that are needed in the classroom for cooking, arranging speakers, material preparation, dusting, and other services needed in the classrooms.
-to coordinate volunteers as they are needed to do some of the "handy person" jobs around the school grounds that are not covered by general janitorial and lawn maintenance people.

Volunteer Survey, Henson Valley Montessori School (Temple Hills, MD)



Henson Valley Montessori School
7007 Allentown Road
Temple Hills, MD 20748
(301) 449-4442

August 1997

Dear Parents,

In a continued effort to know our families better, would you be so kind as to fill out the form below. Not only will it expand our profile, but will help our teachers when they are looking for in-put and support in the classrooms. Many times, various curriculum areas could be expanded by "guests" who have expertise or experience.

Thank You

SURVEY

The Family of ____________________

Mother: Occupation ____________________

Avocation ____________________

Interests ____________________

Father: Occupation ____________________

Avocation ____________________

Interests ____________________

Related Miscellaneous Information: ____________________

Parents can be valuable assets to the classroom as guest specialists.

Volunteer Commitment, Northwoods Montessori School (Atlanta, GA)

These materials set volunteer work and fundraising within the context of the parent-school partnership. Fundraising by parents is clearly tied to the funding priorities determined by the board's long-range plan.

NORTHWOODS
MONTESSORI

August, 1996

Dear Northwoods Parents,

In choosing to enroll at Northwoods, you have made a substantial philosophical and financial commitment to provide an excellent education for your child(ren). Your child will spend the day in the company of students from many different backgrounds—a diversity which is encouraged and valued by the staff and families of our school. Northwoods Montessori offers your family the opportunity to participate in this community in a variety of ways. There are class potlucks and picnics, classroom observations, parent conferences, and parent education meetings where we can all learn more about Montessori and each other.

Another way in which we get to know each other is through our volunteer commitments. Your volunteer hours are essential to the smooth running and cost effective management of our school; they also are ways to spend time with other families. Whether you volunteer to drive on a field trip or provide refreshments for a class meeting or tend garden with a small group of children, personal satisfaction is gained through the connections you make with others in our community.

Attached is a Parent Volunteer Checklist with many opportunities for you to give of your time and expertise. Please consider carefully those ways in which you would like to volunteer and how those activities fit in your family's life. Please return this Checklist to the main office in Doraville by Friday, September 13, 1996.

Fundraising is one of the areas on the Checklist where we need the most help. The Fundraising Task Force has identified fundraising projects for the 96-97 school year, selecting those that give the most return for the least effort. The centerpiece of the fundraising effort is the Annual Fund Drive. We will need volunteers to work on the campaign; if you can help with the Annual Fund, please indicate on the Checklist or call Beth Samples at 770 457-7261. In addition, we ask each Northwoods family to contribute to the Annual Fund and to participate in at least one other fundraiser each year. Attached to this letter is a Fact Sheet to let you know what to expect with the fundraisers you choose to work with. Should you wish to work on any other fundraising committees, please indicate on the Volunteer Checklist.

We are looking forward to another great year at Northwoods. Let us all make time to get to know each other.

Sincerely,

Dianne
Dianne [illegible]
Director of Public Relations

[illegible]
[illegible]
770 • 457 • [illegible]

NORTHWOODS MONTESSORI SCHOOL

FUNDRAISING FACT SHEET - 1997-98

READERS' DIGEST MAGAZINE DRIVE: BEGINS AUGUST 29, 1997

Each family receives a packet of information, including brochures and order forms, the first week of school. Families who participate in the magazine drive are asked to set a minimum goal of 6 magazine subscriptions/renewals. This is very easy to attain through your own personal renewals and those of a few relatives, neighbors, and co-workers. You will have 3 weekends to work on orders. Our goal is to submit our order by the end of September.

This is the eighth year of the magazine drive; profits last year totaled $5,482. We need a parent at Decatur and at Doraville to check orders as they come in; this can be done at home. Please volunteer on the enclosed checklist.

ANNUAL FUND DRIVE: BEGINS SEPTEMBER 29, 1997

This is the 8th year of the Annual Fund Drive which solicits tax-deductible donations from families, alumni, and friends of Northwoods Montessori. Northwoods Montessori is a non-profit organization. Each family is asked to contribute to the Annual Fund; our goal is 100% family participation. Letters and pledge cards go out in September, followed by calls from parent volunteers. Annual Fund contributions last year totaled $9,554.

We need 16-20 parents to volunteer to help with the mailing and the phone calls. Please use your volunteer hours to help with the Annual Fund; call Beth Samples at 770 457-7261.

AUCTION: MARCH, 1998

For the past two years we have conducted an art auction through Regency Fine Art; included were art pieces created by own classes and a silent auction. Next year we would like to change the format slightly and need your ideas and suggestions. We will also need help with invitations, refreshments, publicity and set-up. Please volunteer on the checklist. Profits from last year's auction totaled $7,891.

SPRING CARNIVAL: MAY 16, 1998 in DECATUR

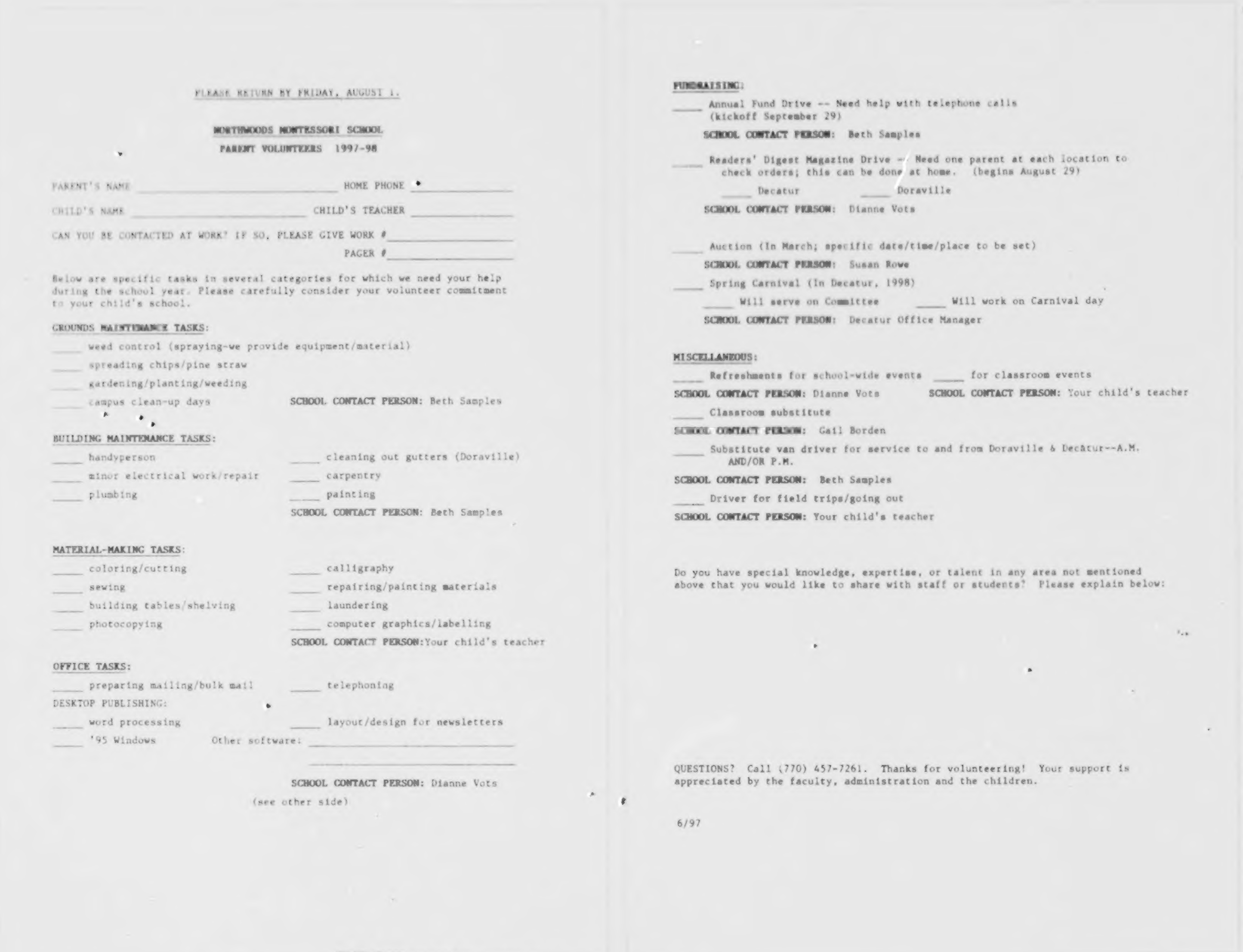
The main idea of the Spring Carnival is for kids to have fun. If you attended this year's Carnival in Doraville, you know first-hand how much fun it was for both children and adults. A dedicated group of parents and staff made all this fun possible. We will need parents to serve on the Committee and to work the day of the Carnival. Please volunteer on the checklist. The 1997 Spring Carnival netted $4,336.

* * * * *

The distribution of monies from fundraising is determined by the Long Range Plan. For 1997-98, fund will be earmarked as follows: SCHOLARSHIP, 50%; PROFESSIONAL DEVELOPMENT, 20%; and OUTDOOR ENVIRONMENT DEVELOPMENT, 30%.

Thanks to all of you who so generously support Northwoods Montessori through participation in fundraising and through volunteer hours. It takes both to assure a quality program for a diverse student population.

Volunteer Commitment, Northwoods Montessori School (continued)



PLEASE RETURN BY FRIDAY, AUGUST 1.

NORTHWOODS MONTESSORI SCHOOL

PARENT VOLUNTEERS 1997-98

PARENT'S NAME ______________________ HOME PHONE ____________

CHILD'S NAME ______________________ CHILD'S TEACHER ____________

CAN YOU BE CONTACTED AT WORK? IF SO, PLEASE GIVE WORK #____________

PAGER #____________

Below are specific tasks in several categories for which we need your help during the school year. Please carefully consider your volunteer commitment to your child's school.

GROUNDS MAINTENANCE TASKS:

_____ weed control (spraying-we provide equipment/material)
_____ spreading chips/pine straw
_____ gardening/planting/weeding
_____ campus clean-up days

SCHOOL CONTACT PERSON: Beth Samples

BUILDING MAINTENANCE TASKS:

_____ handyperson
_____ minor electrical work/repair
_____ plumbing
_____ cleaning out gutters (Doraville)
_____ carpentry
_____ painting

SCHOOL CONTACT PERSON: Beth Samples

MATERIAL-MAKING TASKS:

_____ coloring/cutting
_____ sewing
_____ building tables/shelving
_____ photocopying
_____ calligraphy
_____ repairing/painting materials
_____ laundering
_____ computer graphics/labelling

SCHOOL CONTACT PERSON: Your child's teacher

OFFICE TASKS:

_____ preparing mailing/bulk mail
_____ telephoning

DESKTOP PUBLISHING:

_____ word processing
_____ layout/design for newsletters
_____ '95 Windows

Other software: ______________________

SCHOOL CONTACT PERSON: Dianne Vots

(see other side)

FUNDRAISING:

_____ Annual Fund Drive -- Need help with telephone calls (kickoff September 29)

SCHOOL CONTACT PERSON: Beth Samples

_____ Readers' Digest Magazine Drive -- Need one parent at each location to check orders; this can be done at home. (begins August 29)

_____ Decatur _____ Doraville

SCHOOL CONTACT PERSON: Dianne Vots

_____ Auction (In March; specific date/time/place to be set)

SCHOOL CONTACT PERSON: Susan Rowe

_____ Spring Carnival (In Decatur, 1998)

_____ Will serve on Committee _____ Will work on Carnival day

SCHOOL CONTACT PERSON: Decatur Office Manager

MISCELLANEOUS:

_____ Refreshments for school-wide events

SCHOOL CONTACT PERSON: Dianne Vots

_____ for classroom events

SCHOOL CONTACT PERSON: Your child's teacher

_____ Classroom substitute

SCHOOL CONTACT PERSON: Gail Borden

_____ Substitute van driver for service to and from Doraville & Decatur--A.M. AND/OR P.M.

SCHOOL CONTACT PERSON: Beth Samples

_____ Driver for field trips/going out

SCHOOL CONTACT PERSON: Your child's teacher

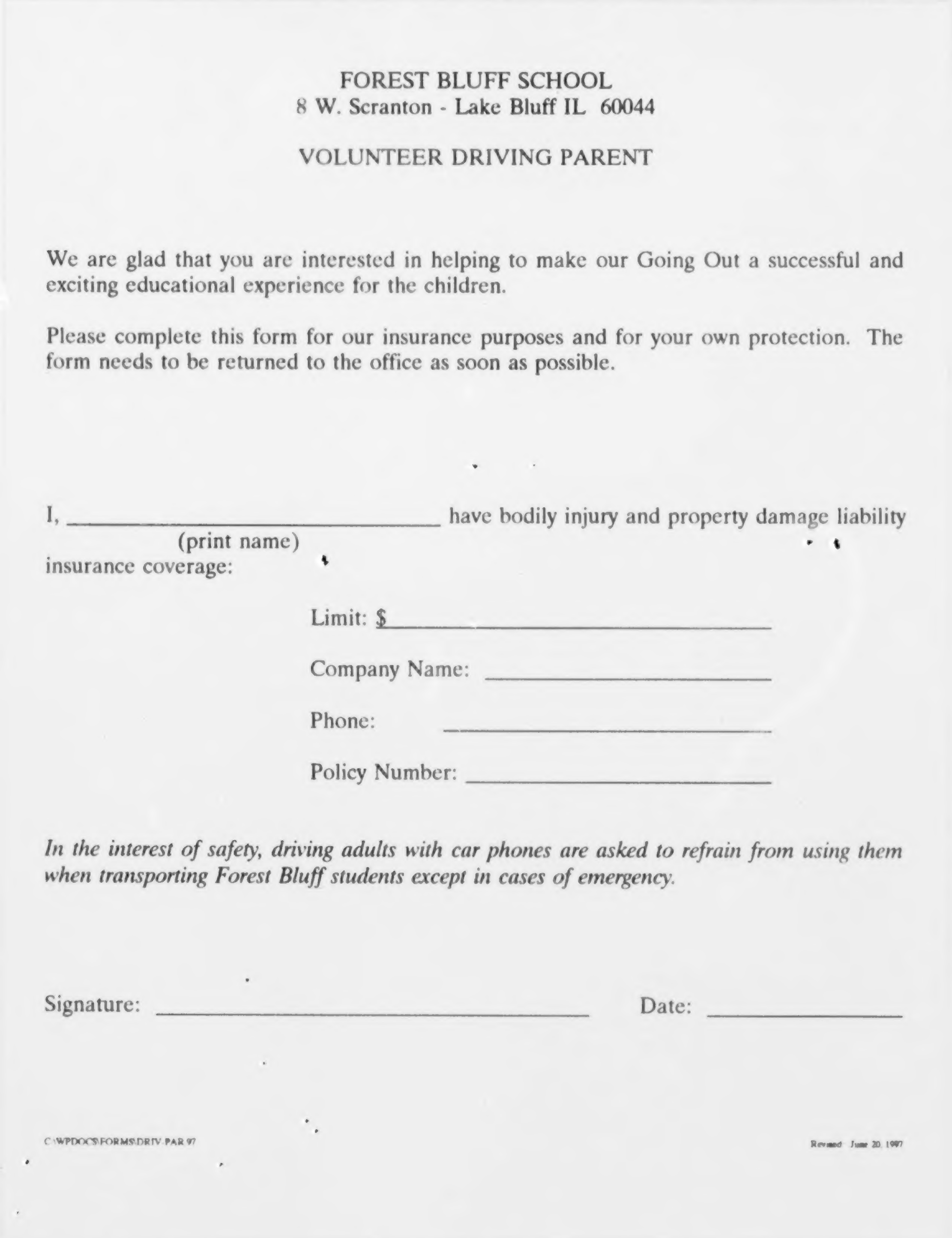
Do you have special knowledge, expertise, or talent in any area not mentioned above that you would like to share with staff or students? Please explain below:

QUESTIONS? Call (770) 457-7261. Thanks for volunteering! Your support is appreciated by the faculty, administration and the children.

6/97

BEST COPY AVAILABLE

Parent Driver Form, Forest Bluff School (Lake Bluff, IL)



FOREST BLUFF SCHOOL
8 W. Scranton - Lake Bluff IL 60044

VOLUNTEER DRIVING PARENT

We are glad that you are interested in helping to make our Going Out a successful and exciting educational experience for the children.

Please complete this form for our insurance purposes and for your own protection. The form needs to be returned to the office as soon as possible.

I, ______________________________ have bodily injury and property damage liability
(print name)
insurance coverage:

Limit: $______________________________

Company Name: ______________________

Phone: ______________________

Policy Number: ______________________

In the interest of safety, driving adults with car phones are asked to refrain from using them when transporting Forest Bluff students except in cases of emergency.

Signature: ______________________________ Date: ______________

C:\WPDOCS\FORMS\DRIV.PAR 97

Revised June 20 1997

To comply with liability insurance requirements, a form is required for volunteer parent drivers.

Individual Parent-Teacher Conferences

by Nancy Hildick

Ms. Hildick's article is straightforward and sensible, delineating the role of teacher as counselor and listener with some very practical tips about setting up a comfortable parent conference.

Reprinted from The NAMTA Quarterly *11.2, Winter, 1986.*

Most parents come to school to meet with their child's teacher a few times each year. These individual conferences provide the opportunity for parents and teachers to discuss all phases of the child's development, social and emotional as well as intellectual. These meetings are not merely reporting sessions but conferences to exchange information necessary to facilitate proper guidance of the child.

Parents can share information about their home life and their attitudes toward their child and the school. Then the teacher will have the opportunity to understand more clearly how the child thinks and feels, and how he or she can be a better teacher to the child. Teachers will want to use this opportunity to answer questions about the school and to explain in detail the specific skills and understandings the child has acquired. Possible reasons for success or difficulty can be discussed.

The information that is obtained by listening, observing, and questioning through these conferences should be used to help parents and teachers work together to perceive and correct problems and to chart a positive course for each child. The more information that is available, the more complete the picture.

What are some different types of conferences?

1. Preliminary or first conference of the year

The first conference of the year should have as its specific aim to establish a positive and constructive relationship between home and school. This session will convey a two-way impression: the parent needing to gain a better understanding of the program offered to the child within the class, and of the attitude of the teacher; the teacher needing to gain a clearer picture of the parent's expectations and of the child's home influences.

Establishing a friendly attitude at the beginning of the year is a positive way to establish rapport, to develop confidence, to set up attitudes of home-school cooperation, and to discuss common needs and goals.

2. Conferences by appointment

These formal conferences are scheduled at specific and agreeable times for both parties. Most elementary schools plan parent-teacher conferences two to four times each year, most often for twenty to thirty minutes per family. However, the teacher needs to be flexible to allow enough time to cover a situation thoroughly. Parents need to feel that they have had ample time to discuss their concerns. Some of these conferences are parent-initiated and some are teacher-initiated. Some conferences are for conveying academic standing, some for problem solving, and some crisis-related. It is the planned conference that is usually the most important information-gathering tool a teacher utilizes.

3. The casual conference

The casual conference usually has less impact than the more formal conference by appointment. Still, many valuable ideas and much information is presented in passing remarks that can be followed through in later conference situations. Often attitudes toward the child or school or conditions at home are mentioned, which lead to a better understanding of problems or home environments. These opportunities for casual conferences should not be overlooked when they arise, but they should not take precedence over other responsibilities.

4. Conferences by telephone

This kind of conference is usually of an incidental nature and is a limited technique. Telephone conversations are used when immediate communication is necessary, for quick information-gathering, and also to keep in touch with special problems, but they are not a substitute for face-to-face parent-teacher conferences.

5. Conferences that include the child

Parents and teachers often need to know how the child feels and thinks about a situation and to allow the child the opportunity to set his or her own goals. If the child is to be included, she or he must be a participant. The child should never be present if she is being discussed but is not included in the discussion. Likewise, the child should be included only when the conference concerns matters that involve him or her. The extent of participation may depend to some degree upon the age and maturity of the child.

These conferences should be brief and should aim to provide the secure knowledge to the child that parents and teachers care about him or her and share an understanding.

What helps to make an effective parent-teacher conference?

Preliminary Preparation

1. Determine the specific purpose for the conference. The reason for the conference should be known to parents and teacher prior to the meeting to allow for adequate preparation.
2. Invite the parents to meet at a mutually agreeable time.
3. Contact any specialists who need to be included.
4. Prepare samples of the child's work.
5. Make a list of the issues to be discussed. Write down some pertinent questions you want to ask or some comments you want to make about the child. Don't trust your memory. Be sure to include a list of the child's assets and strengths.
6. Consider the format that you will use.
7. Tell the children in your class why parent conferences are important. Pupils will benefit when they realize that the adults who influence their lives are working together. Let the class know you welcome the opportunity to meet with their parents.

Physical Setting

1. Choose a comfortable and informal setting. Arrange seating so the parents and teacher are sitting face to face. The teacher should be sitting away from his or her desk.
2. If your conference area is not your classroom, prepare it so it reflects an educational environment.
3. Be sure the conference area is private, both auditorally and visually.
4. If there is a series of conferences, then provide a comfortable place for parents who are waiting. Post a conference schedule outside the door. Supply books and related class materials in the waiting area.

The Conference

1. Greet parents at the door. Smile and invite them to the conference.
2. Indicate areas of the child's strength first. Beginning the conference with positive comments about the student will set the stage for positive interaction. Then the teacher can gradually move into any problem areas. The teacher needs to be responsive and sensitive to understanding the family's life by creating a positive and supportive environment, not an investigation. Parents need to feel accepted, both verbally and nonverbally.

3. Give the family the opportunity to talk to you, a qualified listener who knows their child. Teachers conducting parent conferences often talk too much when they need to listen. As teachers listen to parents' comments and complaints, they not only learn parents' attitudes and beliefs, but they also gain in sympathy and understanding. Parents will be ready to listen to the teacher after they have had a chance to express their concerns and suggestions.

4. Use reflection and paraphrasing as an interviewing technique. Reflection means putting into different words what the parents have said. This does not mean every word, but some key phrases, or unspoken feelings, or half-understood statements. Paraphrasing can indicate to the parents that the teacher is paying attention or is trying to understand what they have to say.

5. Observation is an important part of a successful parent-teacher conference. Communication most often involves more than just conversation. Through observation the teacher might be able to determine signs of embarrassment or discomfort or signs of positive reactions. Even a parent's dress and manner of speech may help to determine what suggestions and level of conversation should be used.

6. It is what the family hears that makes the prime impact. The teacher needs to communicate carefully to be clearly understood. The teacher's knowledge and understanding of a situation is secondary if the parents have not clearly understood. Eliminate educational jargon and use meaningful, simply stated conversation.

7. Stick to the objective of the conference. If the conversation drifts away from the aim of the conference, the teacher will need to guide the discussion back into meaningful areas.

8. Recognize that your beliefs and attitudes are a part of yourself. These beliefs and values will play a role in shaping the goals and outcome of the relationship and in choosing the methods to be used.

9. Be aware of your emotional reactions if parents question or disagree with you. Some parents have unpleasant memories of being pupils. It is important that the teacher accept these feelings without being defensive.

10. A knowledge of self-limitations is important to the teacher. Some conflicts may not be resolved due to factors not apparent in surface interviewing. An unresolved problem may indicate the need for the outside services of a counselor or other support professional.

11. Offer suggestions about what parents can do to help at home. Be realistic about what the parents can and will contribute. If a plan of action is proposed, be sure the parent agrees.

12. Specify the conclusion or goal; however, avoid making a definite prognosis, one that might create false expectations or undue hope. End with encouragement. Summarize and mutually plan for the next meeting.

After the Conference

1. Take time to summarize the results and keep notes for the next conference.
2. Notify any involved support staff of the results of the conference. Conferences are professional meetings; thus, none of the information may be disclosed except to those qualified to receive it.
3. Each conference is a unique meeting, just as the personality of each parent and teacher is different. There is no complete set of rules for successful parent-teacher conferences. Through training and experience, the teacher learns how to develop and conduct conferences that develop meaningful relationships between parent and child and school.

Building a Professional Community

Like admissions, hiring is the beginning of the staff's orientation to the unique community of the school. Engaging a teacher contractually is the outcome of dialogue between school and applicant, and requires a focus on the hopes, reflections, and aspirations of both parties–community and individual. Once hiring takes place, roles are defined through the written record, and relationships among staff are governed by principles implicit in the operational policies and procedures that guide the school's community cohesiveness and smooth operations.

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Hiring and Orientation of Staff

Introduction

Hiring, like admissions, can be seen as facilitating the match. The school must choose the candidate, and the candidate must choose the school. Through visits and interviews, the individual and the school can determine whether there is a match of philosophy, approach, and style of operations. After the match is determined and the contract signed, the new staff member begins an orientation process, aided by a personalized welcome and introduction to existing personnel. An employee handbook or school policy manual (described in the next chapter) provides the security of clearly stated procedures and expectations, promoting the smooth functioning of the school.

Hiring

Fair Hiring Practices

All nonprofit organizations should display a nondiscrimination clause on their employment applications. The school should identify itself in any employment advertising as an equal opportunity employer and should carry out a policy to recruit, hire, train, and promote persons without regard to race, religion, color, gender, age, national origin, ancestry, marital status, or disability. This policy ensures equitable treatment in hiring, benefits, privileges, and conditions for any employed position in the school. This detailed equal opportunity statement is from the employee handbook of Lake Country School (Minneapolis, MN):

See Chapter 2 for detailed nondiscrimination information, including appropriate phrasing to include in school promotions

> LCS affirms the right of every person to participate in employment without regard to race, color, religion, sex, national origin, age, sexual orientation, disability, marital status, status with regard to public assistance, disabled veterans or Vietnam era veterans status, or membership/activity in a local human rights commission, and in accordance with all applicable laws and regulations of federal, state and local governing bodies. This applies in all areas of employment, including recruiting, hiring, promotion, transfers, benefits and training.
>
> Specifically LCS will implement this commitment by providing equal employment and advancement opportunity on the basis of merit within the context of its unique environment.
>
> If you have a complaint in this area, see the Principal.

Questions about sex, religion, age, marital status, or race are considered discriminatory and should not be asked, either on the application or in the interview. The interviewer should ask the same questions of each applicant in order to avoid a fairness issue later on. This is particularly important when interviewing close associates.

All résumés received for an opening should be kept on file for a specified period (sometimes governed by state or local law) in case any question of fair hiring arises. Consult an attorney for detailed information on fair hiring and record keeping.

Requirements for Employment

Legalities regarding background checks and health clearance are becoming more and more stringent and create liability exposure if overlooked or not properly documented. Typical employment requirements include the following:

- Tuberculosis screening (may be required by state or local health regulations)
- Criminal record check (may be required by state or local law)
- Proof of citizenship or eligibility to work in country of employment
- Submission of W-4 and/or any other required income tax documents
- Training in first aid and/or bodily fluid handling (may be required by health regulations)
- Signing of a confidentiality statement
- Montessori diploma, college/university diploma, and/or state teacher certification documentation, as appropriate
- Submission of any school-required forms: emergency contact, application form, etc.

Head of School

The head of school, principal, headmaster, or administrator is responsible for the all operations of the school. The head represents the school to the community and promotes its vision and programs. The head oversees the school's finances and facilities as well as staff and program development. The job description for head of school includes several roles: visionary, educator, manager, communicator. Ideally, the head has strong Montessori experience–either Montessori teacher training or extensive knowledge about and involvement with Montessori education.

A Montessori-trained head of school can help teachers in many ways: in finding consensus about their goals and objectives, in prioritizing materials for purchasing, in making decisions concerning their classrooms, in conveying Montessori principles to parents. A head with Montessori training is also more likely to evaluate teachers not only for their effectiveness with children but for authentic Montessori classroom practices. Trained Montessori leadership can also insure that teachers are properly Montessori-trained at the levels they are assigned to teach.

Because a comprehensively prepared head of school is difficult to find, some large schools structure their administrative leadership as two positions, an executive director and an educational director. The educational director is Montessori-trained and is responsible for the educational programs and staff, while the executive director operates the business of the school. One position should, however, have final authority. If final authority rests with the educational director, then the executive director should have a subordinate title, such as business manager or administrator.

A Montessori leader with a vision is advantageous to the direction and inspiration of the whole school community. School leadership is best supported by a visionary with good communication skills, self-assurance, maturity, an understanding of Montessori education, and a willingness and patience in working with people.

Hiring Process

The head is hired by the board of trustees. Generally, the board appoints a search committee to recruit candidates and recommend individuals for interviewing. It is not advisable for staff members to serve on the search committee, although they should have an opportunity to meet with candidates who are interviewed.

Job Description

For more information on board-head relations, see Chapter 2

In order to develop a clear job description for the head of school, the board must examine the purpose, needs, and priorities of the whole school. In writing the job description, the board determines those qualifications and characteristics that are most important to this critical role. The board also clarifies the responsibilities of the head and the relationship between the board of trustees and head of school.

Reviewing Applications

At minimum, applications should include a résumé and references. Many schools ask candidates to provide a personal statement reflecting their philosophy of school leadership and the reasons for their interest in the position. The search committee reviews all applications and selects three or four for active consideration.

The committee contacts references of the selected candidates. Although candidates may include written letters of reference, conversation with a minimum of three references is essential. It is wise to talk with at least one board member and one colleague from the candidate's previous school. A standard set of questions for all references facilitates analysis of responses and fairness in the process.

Interviewing Candidates

The School's Perspective

After review of references, the search committee recommends candidates to the board for interviewing. Generally, the board chair contacts the candidate to schedule the interview. The interview is planned to provide the candidate with a view of the full scope of the school's program. In addition to the interview committee, the candidate should meet with faculty, the current head of school (if appropriate), and the board chair. The school should also arrange a tour of the larger community, highlighting its attractions and amenities.

The interview committee is usually composed of representatives from the board and the search committee. Specific discussion of compensation and benefits occurs in an individual meeting with the board chair or other designate and is not part of the discussion with the full interview committee. Following are sample questions designed to elicit discussion about a broad array of issues critical to the role of school head:

- What are your personal goals as an administrator? What professional goals do you have and how do they integrate with running the school? What were the past strengths and weaknesses of your administration? How do you make decisions? Having observed the school, what changes would you make?
- What is your view of the role of the board? How do you work with a board? What are your reporting approaches? How do you develop policy and evaluation regarding school operations? What is the head of school's role in funds development? What is your approach to budgeting? How do you determine priorities from year to year? How would you overcome obstacles facing the school (e.g., enrollment shortfall, fundraising lull, teacher conflict, etc.)?

- What is your philosophy of managing a staff? How would you strengthen the school community? How would you help the faculty develop academic orientation and strengthen their understanding of Montessori education? How would you deal with family complaints about teachers? How would you deal with children with special needs? What are your priorities in school record keeping? How do you handle the referral of a child who may need a different school environment? What auxiliary support do you recommend for the teachers? What do you see as the relationship between specialty subjects and main program?

The Candidate's Perspective

The candidate seeks an overview of the school and its challenges. Prior to the interview, the candidate requests specific information that gives a sense of the school's vision and operations: bylaws, promotional materials, policy and procedural manuals, newsletters, budgets, financial statements, staff profiles, etc.

As part of the interview visit, the candidate should observe every class in the school and, if appropriate, discuss observations with the current head. The candidate should also prepare a short presentation for a meeting with staff. The following sample questions could be asked by the candidate when meeting with the interview committee:

- What are the most recent achievements of the school? What are the current initiatives? What are the immediate challenges to be addressed? Is there a long-range plan? How are goals established?
- How would you characterize the educational program of the school? How are program and faculty evaluated? Has there been outside consultation or evaluation of the program? Who hires staff and what are the qualifications for selection? How are decisions made about program and operational policies?
- What is the composition of the board? What is the board's role? What is the relationship between the board and the head? Does the board respect the autonomy of the head of school to oversee the operations of the school? How are grievances from parents and staff handled? Why is the current head leaving?
- Describe the current financial situation of the school. What is the annual operational surplus or deficit? What is the current reserve? How is the budget developed? What is the school's approach to fundraising? What is the board's role in fundraising? When was the last capital campaign and what was the result? Does the school conduct an annual fund drive?

Final Selection

The interview committee recommends its choice to the board, which authorizes the chair to make a specific offer of employment. The committee may recommend a first and second choice in the event that the first candidate declines the school's offer. Some negotiation of terms may be expected in reaching a final agreement. Once the candidate has accepted the position, an announcement is made to the entire school community.

Orientation

Change of leadership involves a transition period. Several key factors can facilitate the orientation of a new head of school and promote a positive transition process for the school community.

- A short profile of the new head can be distributed to parents and staff. Including a few family or personal details and a photo provides a good first introduction before the head's arrival at the school.
- There should be a clean break from the previous head of school. Although the new head may choose to consult with the previous head, there should be a definite end to the former head's involvement with the board and staff of the school. The previous head should remain apart from all school issues.
- Close contact with the classes and faculty is the new head's top priority in the first months. The head is responsible for knowing the whole program of the school; future decisions require concrete knowledge of all school activities and the people involved.
- The board chair and the new head should establish a regular schedule of meetings. The chair can orient the new head to the priorities and concerns of the board and hear the ideas and priorities of the new head. Good communication between the new head and the board chair facilitates a positive working relationship of the head with the board.
- The new head should refrain from making immediate personnel changes. Close consultation with staff and board about the program builds a basis for making recommendations for future personnel plans.
- A new head has the advantage of fresh perspective and is expected to take on new initiatives based on a view of the needs of the whole school. Many good decisions, which are in the best interest of the school, may at first be resisted by a particular group or individual. It is important that the board support the autonomy of the new head in making changes in the operations of the school. In making these decisions, the new head must be open to the voices of all, yet act independently to balance the various elements in service of the broad goals of the school.
- The new head should be very visible to everyone in the school. The presence of the head of school in classrooms, at parent meetings, in planning sessions, and at social events facilitates orientation to the whole community. A monthly community letter or column in the school newsletter is a positive way for the new head to communicate reflections, ideas, and insights.

Faculty

The faculty is the most critical element in developing a strong Montessori program. The teacher is a direct resource for the child. In a Montessori program, each teacher is responsible for preparing an optimal environment for a group of children while assisting the unique development of each individual child. The teacher is also the primary link between the school and the family.

Quality faculty demands quality teacher preparation. Shortcuts in teacher training show up in the classroom. In selecting faculty, the school sets basic standards for education and preparation of candidates. Although teacher candidates have individual traits and talents that are important in the final selection, insistence on a consistent quality of training builds a cohesive program throughout the school.

Hiring Process

There are two major approaches to attracting candidates for faculty positions: advertising and sponsorship. Advertising is used to recruit for a specific position. It allows schools to reach a large pool of potential candidates, including experienced teachers. Sponsorship is a longer-range approach to recruitment. It allows schools to plan for program expansion and to be prepared to fill unanticipated teacher vacancies. Sponsorship also builds long-term faculty commitment.

Advertising for Faculty

As early as possible, the head of school determines the need for new faculty in the upcoming school year and begins an active search. Information about the position is advertised in a variety of ways in order to reach a large number of potential candidates. Attractive descriptions of the position and the school should be placed in national Montessori journals, regional Montessori association newsletters, local newspapers, and on the school's Web site.

See Chapter 10 for information on the contract renewal process

Schools should demonstrate collegial respect toward other Montessori schools when recruiting teachers. Directly soliciting an individual teacher from another school is discouraged. Instead, a large direct mailing to teachers and school heads giving details of an available position informs the Montessori community and allows interested teachers in other schools to make further inquiries.

Reviewing Applications

An application for a faculty position includes personal information, a résumé of education and experience, and a list of professional references (see applications in this chapter's Sample Documents). Many schools also ask applicants to submit a personal essay or answer a series of questions in writing.

MONTESSORI PUBLICATIONS THAT ACCEPT EMPLOYMENT ADVERTISING

AMI Elementary Alumni Association Newsletter
AMI-EAA
Contact information changes from year to year. Call AMI/USA or NAMTA for current information.

AMI/USA News
AMI/USA
410 Alexander St.
Rochester, NY 14607
phone: (716) 461-5920
fax: (716) 461-0075
usaami3@aol.com

CCMA Net
Canadian Council of Montessori Administrators
P.O. Box 54534
North York, Ontario M5M 4N5
Canada
phone: (416) 789-1334 or (800) 954-6300
fax: (416) 789-7963
mailbox@ccma.ca
www.ccma.ca

Montessori LIFE
Publication of the American Montessori Society
c/o Joy Turner
17583 Oak St.
Fountain Valley, CA 92708
phone: (714) 968-0107
fax: (714) 964-0800

Public School Montessorian
Jola Publications
2933 N. Second St.
Minneapolis, MN 55411
phone: (612) 529-5001
fax: (612) 521-2289
Jolapub@aol.com

The NAMTA Bulletin and *The NAMTA Journal*
North American Montessori Teachers' Association
11424 Bellflower Road
Cleveland, OH 44106
phone: (216) 421-1905
fax: (216) 421-8193
staff@montessori-namta.org
www.montessori-namta.org

The National Montessori Reporter
National Center for Montessori Education
P.O. Box 1543
Roswell, GA 30077
phone: (770) 613-0055
fax: (770) 613-9738
ncme@mindspring.com
www.mindspring.com/~ncme

Tomorrow's Child
The Montessori Foundation
901 N. Pitt St. #310
Alexandria, VA 22314
phone: (703) 299-0330
fax: (703) 299-0360
Tim_Seldin@aol.com
www.montessori.org

The head of school contacts references of all candidates being considered. If a candidate is an experienced teacher, it is important to talk with both the head and a faculty colleague from the previous school. In all cases, the applicant must give permission for references to be contacted. A standard set of questions facilitates the reference checks (see reference forms in this chapter's Sample Documents).

Interviews

Following review of the applications, the head selects several candidates for interviewing. The interview should be seen as a reciprocal dialogue in which the head and the candidate explore the likelihood of a good match between the individual and the school.

The Head's Perspective

The head prepares a general set of questions to guide the interview. Questions are open-ended and deal primarily with personal and professional development and philosophical issues. Some questions should be designed to examine the candidate's problem-solving approach. Following is a list of sample questions. Keep in mind that these questions will need to be focused differently if the candidate is a new teacher without prior experience.

- Why did you become a Montessori teacher? How do you define your personal goals in this profession?
- What do you consider to be your strengths in working with children? What are your greatest challenges?
- What would be your top priorities in beginning to work with this class?
- How would you set up the environment? How would you use the outdoor environment?
- What areas of the curriculum would you like to develop? What support can you give to art, music, and movement?
- How would you design parent education meetings? How would you conduct parent conferences?
- How do you deal with discipline? How do you convey concerns or negative information about children to the parents?
- What did you like best about your former (or current) school? What did you like least?
- Why are you leaving your current school? (Why did you leave your last school?)
- How would you describe your relationship with your colleagues? parents? head of school?
- What do you look for in a school? What are your expectations of a head of school?

As the interview progresses, the head notes other aspects that are important: level of confidence, clarity of expression, warmth, sense of humor, careful listening, and general presentation. The head also discusses compensation and benefits and invites specific questions about employment at the school.

Some schools involve others in the interview process for potential faculty. Often this is done as a second interview, usually involving the head (who has already established rapport with the candidate) and other faculty of the same level. Having the candidate meet with his or her potential colleagues can provide valuable input for both the candidate and the head.

Generally, a decision about employment is not made on the day of the interview. However, it is important to give positive feedback and indicate when a decision is expected. When an offer is extended, the candidate is given a contract and a clear deadline for response.

Once the offer has been accepted, the head personally contacts the other candidates who were interviewed and notifies all other applicants that the position has been filled.

The Applicant's Perspective

The applicant should request information prior to the interview: a job description, promotional materials, faculty handbook, parent handbook. These materials give a sense of the school's philosophy and policies and help the candidate to prepare for the interview with the head.

Prior to the interview, the candidate should observe the classroom. If the position is to develop a new class, observe another class of the same level. It is helpful to observe briefly in classrooms of other levels to gain a view of the whole program.

The applicant should prepare questions to find out more about the school and the head's ability to communicate clearly. Some questions may be prompted by the classroom observations. Following is a range of questions that may be appropriate:

- What is the composition of the student body? How does the school address the issue of diversity?
- What are the admissions policies, particularly regarding children over four without Montessori background? Who makes admissions decisions?
- What is the degree of autonomy for the teacher? Are there curriculum expectations or school standards for student achievement?
- What are the expectations for teacher involvement beyond the classroom?
- How is the school organized? Who will be my supervisor? How will I be evaluated?
- What is the staff turnover? (Ask to see a biographical sketch of the staff.)
- Who will be my assistant? How are assistants chosen and evaluated?
- What are the grievance procedures? What is the process for parent complaints about their child's class or teacher?
- What is the budget for classroom materials and modifications? What is the policy regarding handmade materials?
- How does the school support professional development of faculty? How much is budgeted for conferences, workshops, etc.?
- Ask for clarification of compensation, benefits, terms of contract, or other employment policies. What long-term salary advancement can be expected?

At the conclusion of the interview, the applicant should indicate genuine interest in the position and determine when a decision will be made and how he or she will be notified. A follow-up letter reinforces interest in the position.

If selected, the candidate is offered a contract and a deadline for response. The candidate should clarify any questions about the contract with the head before committing to accept employment.

Hiring through Sponsorship

The growth and expansion of Montessori programs is limited by a shortage of highly qualified Montessori teachers. Schools cannot be confident of attracting teacher candidates to fill vacancies or to add new classrooms. Consequently, many far-sighted schools regularly sponsor candidates for Montessori teacher training.

Selecting the Sponsored Candidate

In many cases, a school sponsors someone from its own community. Generally, the candidate has already demonstrated ability with children and alliance with Montessori principles. Sponsorship also allows the school to build a career path option into its program for proven staff who want to become Montessori teachers or train for teaching at a different level. A major advantage of this approach is the likelihood of long-term commitment to the school.

Even when the choice of a candidate for sponsorship seems clear, it is advisable to ask the candidate to submit a résumé and a statement of goals (see the application for sponsorship in this chapter's Sample Documents). An interview conversation with the head of school ensures that both the school and the candidate have the same expectations and are prepared to enter into a mutual long-term commitment.

The Sponsorship Agreement

Generally, the sponsorship agreement includes the following:

- The candidate receives support in the form of an interest-free loan for Montessori teacher training in return for a multi-year commitment with the sponsoring school (usually three or four years).
- In most cases, the school agrees to forgive the loan incrementally with each year of subsequent service by the candidate. Sometimes the candidate is required to pay back the loan, or a portion of the loan, through pro-rated deductions from each paycheck over the term of the multi-year agreement.
- In the event that the candidate does not complete the training or terminates employment, the candidate is required to pay back the balance of the loan with interest calculated from the date of disbursement.
- A formal contract specifies the expectations and responsibilities for the sponsoring school and the candidate (see sponsorship contracts in this chapter's Sample Documents).

It is not recommended that schools provide for all the candidate's costs. Generally, the sponsorship provides for tuition, travel, and related schooling expenses, asking the candidate to pay living expenses as part of his or her personal investment. In developing a sponsorship plan, schools are advised to invest in the starting salary in order to support the candidate's ongoing employment rather than give an overly generous training subsidy with a diminished starting salary.

The sponsoring school may wish to pay tuition directly to the training center, leaving the travel and discretionary part of the sponsorship in the hands of the trainee about one month prior to departure. Receipts may be requested to document use of the funds for the training purposes.

Orientation of New Faculty

A new teacher brings idealism and enthusiasm to the challenges of the first year. Even for experienced teachers, the first year in a new school involves developing new relationships, mastering classroom resources, learning administrative procedures, and assimilating the culture of the school community. Beyond initial welcome and information, orientation for new faculty should be viewed as an extended process throughout the first year.

- The most important focus for the new teacher is developing a relationship with the children in the class and their parents. Informal visits with the children and parents prior to the start of school ease the transition.
- New teachers should have a special "start-up" allowance to personalize the prepared environment. The head should expedite small modifications to the classroom that allow the new teacher to make it his or her own.
- A new teacher needs both hands-on and hands-off support. It is critical to provide autonomy without abandoning. The teacher must be allowed independence in conducting the class, recognizing that trial and error is part of developing solid practice. Parents may need help from the head of school in accepting inexperience.
- Regular meetings between the head and the new teacher provide ongoing support. The head elicits the teacher's questions, concerns, and successes. Positive reinforcement and a focus on strengths help the new teacher to see the real progress being made in adapting to the new situation. During these meetings there is gradual orientation to administrative mechanics, usually in the context of current activities. Frequent discussions allow the head to build rapport and provide proactive support.
- The head engages other faculty in the ongoing orientation of new teachers. Peers are particularly valuable in helping to orient new faculty to the diverse elements of program and school culture (curriculum plans, record keeping, parent conferencing, preparing for class meetings, organizing going out, celebrations, etc.). The involvement of other faculty ac-

knowledges the contributions of experienced teachers and helps the new teacher to build collegial relationships.

- If the new teacher is also new to the area, the school must be sensitive to the need to make social contacts and orient to the larger community. Initially, the head of school may invite the new teacher for dinner. Other faculty may also invite the new teacher for meals or include him or her in outings, excursions, or events such as a concert, movie, or ball game.
- Many of the school's operational procedures are available to the new teacher in the staff handbook. However, it is not sufficient to simply give the handbook to new faculty. The head of school should discuss specific procedures in context of the teacher's work throughout the first months. Of particular importance is the Code of Ethics, which should be part of initial orientation and reviewed periodically. The Code of Ethics is a statement of the agreements within the school regarding confidentiality, professional conduct, and conflict of interest.

See Chapter 10 for a full discussion of the faculty handbook and the Code of Ethics.

Support Staff (Classroom and Administrative)

Defining Support Needs

Additional staff play key roles in supporting the work of the Montessori school. These staff positions are divided into two major areas: classroom support and administrative support. Classroom support includes class assistants and other specialty staff who may be directly involved with the children or work with the teachers. Administrative support includes all other operations essential to the school. As schools expand, it is critical to examine the need for support staff and to clearly define their roles. The school should guard against becoming "administratively top-heavy," ensuring that resources to support the educational program are prioritized.

Hiring Process

The head of school has the ultimate responsibility for hiring all support staff. In the case of classroom support, the teachers are involved in interviewing. The teacher's recommendation is particularly important in selecting a classroom assistant whose skills and personality complement those of the individual teacher. The head may also include another staff member when interviewing for administrative support, particularly if the staff member will be involved in supervision.

Orientation of Support Staff

Support staff are integral to the life of the school. They should be introduced to the entire community through a written welcome and brief personal profile and to the other staff in an informal welcoming reception.

New staff need orientation to the specific responsibilities of their position, the general procedures of the school, and Montessori principles. The direct supervisor is primarily responsible for orientation to job responsibilities. In the case of classroom assistants, this is always the classroom teacher.

The head provides an overview of procedures and written policy guidelines, including the Code of Ethics. The teacher, or other supervisor, continues to orient support staff to these procedures through regular discussions. In many schools, the head works with faculty to design a series of activities to orient the new staff to Montessori principles and the vision of the school. All staff members are perceived as representatives of the school and should share a similar understanding of the school's goals and philosophy. Support staff need to be particularly sensitive to issues of confidentiality in communicating with parents.

See Chapter 10 for more information on confidentiality

Contracts

A contract is signed with every employee of the school. Although no contract is foolproof, it is a legal representation of a mutual commitment of school and staff. In drawing up a contract, the advice of a lawyer is strongly recommended.

A contract usually includes key terms rather than attempting to delineate all details. Generally, the contract is for a specific time period and is reviewed annually. Although contracts for different positions vary in some elements, the terms of all contracts include the following parts:

- **Agreement:** The agreement identifies the parties involved and assigns their respective titles for contract purposes.
- **Employment:** The statement of employment includes the employer's intention to employ and the employee's intention to accept employment. The term of employment should specify the entire scope of on-premises obligations, which may not reflect pay periods. For example, a school's teacher contract may specify ten months of on-site employment responsibilities while disbursing compensation over twelve months. Contract hours are specified and include all hours during which the employee is expected to be on site (including preparation and planning time).
- **Compensation:** The contract states the specific compensation amount, whether it is in the form of salary or wages, and how payments will be made. Most schools issue compensation in a bi-weekly or monthly check. In some schools, salaried teachers and classroom support staff may choose either a ten-month or twelve-month contract. Many schools, however, mandate that all salaried employees receive compensation over twelve months. The latter strategy may be more convenient for the school's cash flow; it also provides more incentive for teachers to finish end-of-school-year duties.

See Chapter 10 for more on an employee's on-site responsibilities

- **Benefits:** The contract enumerates the fringe benefits to which the employee is entitled. Specific discussion of benefits is usually handled in the employee handbook (see below).
- **Duties:** This section is usually a brief list of employee's responsibilities and the extent of school demands. This clause may simply refer to the appended job description.
- **Leave:** The contract alludes to any specified sick leave, vacation, personal days, or professional leave the employee is entitled to. Specific discussion of leave policies, including unpaid leaves of absence, is usually contained in the employee handbook.

See Chapter 10 for a discussion of policies related to benefits, leave, termination, etc.

- **Termination:** The termination clause should be carefully written to meet legal requirements to demonstrate nondiscrimination and due process (clear and fair procedures such as warning, notification, appeal, etc.) while at the same time protecting the employer. A more detailed termination policy may appear in the employee handbook.
- **Job Description:** The job description is usually appended to the contract. A job description is a brief summary of the major responsibilities of the prospective employee and the expectations of the school. A job description should be written for every position in the school. A good job description summarizes the key responsibilities of the employee, recognizing that no description can be all-inclusive (see job descriptions in this chapter's Sample Documents).
- **Agreement Not to Compete:** Contracts with faculty often contain a clause prohibiting the employee from "breaking off" and starting a new school with students from the contracting school.

Frequently Asked Questions

How can a school really know that a match will be successful between itself and a head of school or teacher candidate?

When interviewing for head of school, the search committee should provide an occasion for the candidate to meet with faculty and answer questions. The candidate's chemistry with staff and manner of answering questions will never be a definitive source for making a hiring decision, but it will certainly provide some critical feedback as to how the prospective head relates to a group under the stress of being new. It also shows how articulate the candidate would be as a spokesperson for her or his own philosophy of management and Montessori vision. Questions could be framed ahead of time in order to avoid off-the-cuff questions, which are sometimes off-putting or inappropriately personal.

When a teacher interviews, it might be advisable to have him or her meet the staff and spend a day with prospective colleagues who are teaching at the same level. Ideally, the candidate should be observed presenting a lesson to children or at least interacting with children.

In either case, the person in charge of hiring (search committee chair when hiring a head or head of school when hiring a teacher) should be available to observe these unique points of interaction, which provide relevant feedback for making the decision about the position.

When should a school decide to close a search, and what can be done if a position has not been filled?

This is a very hard decision. Generally, however, by June, prospects run dry, so decisions have to be made with the available personnel options. In the case of a head of school, if the right candidate has not emerged, an interim status is usually a way of deferring a final choice. Internal candidates sometimes make good interim heads, especially if they have longevity with the school and sufficient people skills. It is obviously important, under any circumstances, not to hire a permanent head who is not clearly the right candidate. Another solution, although less than desirable, is to establish a teacher council for a year, with head teachers who represent each age level of the school making decisions in cooperation with the rest of the staff.

The scarcity of well-trained teachers, especially at the elementary level, puts schools in a very compromised position if they have not hired by June or July. Although a preschool (3-6) class should not be taught by any other than a preschool-trained teacher, there are some emergency options that could be considered if there are simply no teachers available for the elementary level:

- A lower elementary class can be temporarily sustained by a preschool (3-6) teacher, with a trained elementary teacher meeting weekly with the preschool teacher to present cultural lessons with which the preschool teacher might not be familiar.
- A trained elementary teacher from one class could work with another class in an adjacent or common environment, team teaching both classes with one or two preschool-trained teachers. The elementary-trained teacher would do the cultural lessons for both classrooms while directing the preschool-trained teacher(s) in the other subject areas.
- An upper elementary class could be taught by a teacher without Montessori training who does have state teaching certification and some contact with alternative education, provided the teacher were willing to participate in two curriculum meetings weekly with an outside Montessori-trained consultant or a trained teacher at the school. It the untrained teacher wished to stay at the school, he or she would then be sponsored for Montessori elementary training, probably over several summers.

- A head of school may have to step in and teach a class if appropriately trained for the level that requires a teacher.

These options are temporary measures, to be used for no more than one year, during which time the school should sponsor a candidate for Montessori training at the needed age level.

Further Reading from NAMTA

The following articles and documents are available as photocopies from NAMTA. See Appendix 4 for ordering information.

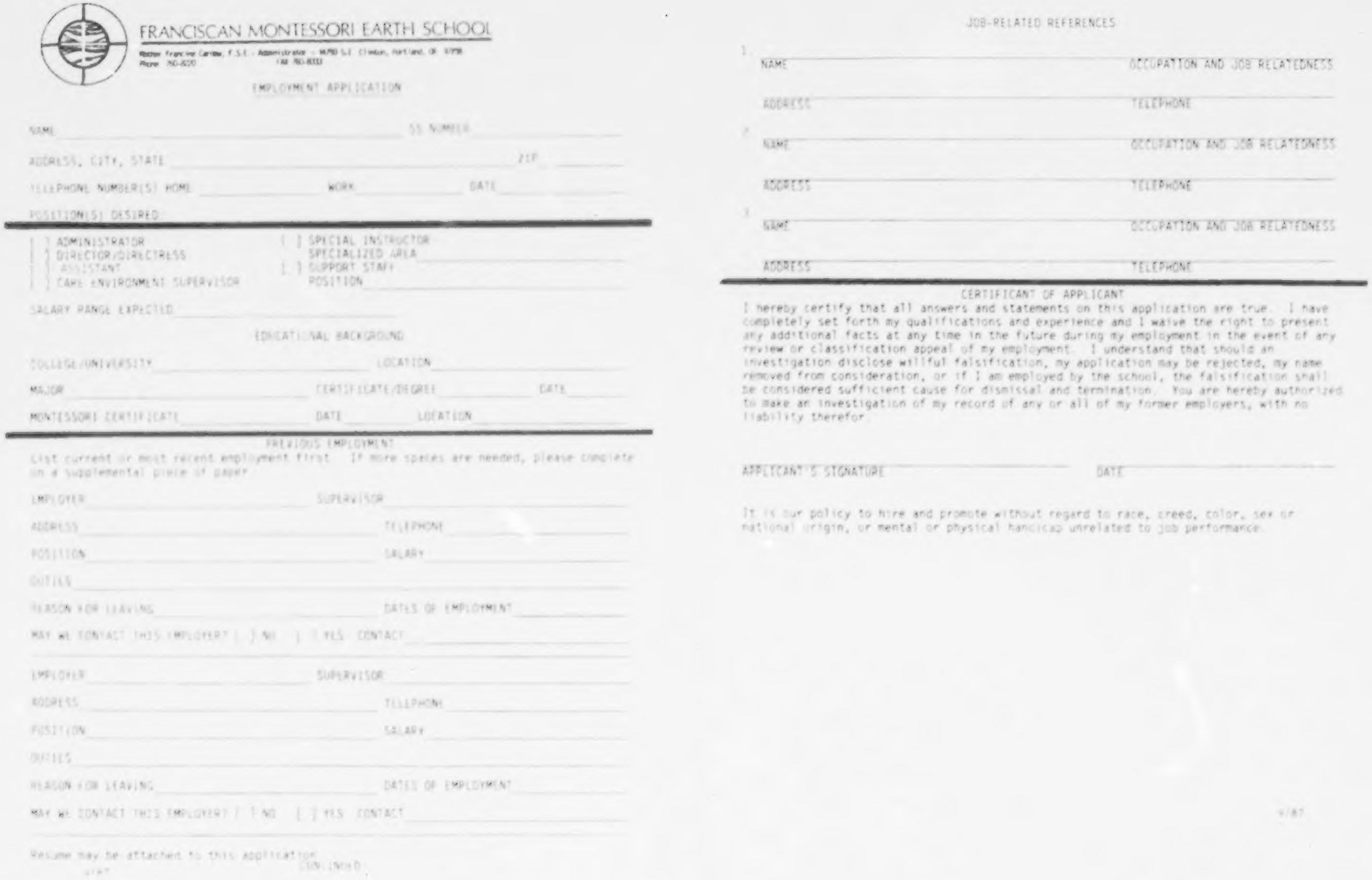
Cannon, Nancy. "Staffs: The Untapped Resource." *The NAMTA Quarterly* 7.2 (1982, Winter): 38-40. 2 total pages.

Kahn, David. "Departmentalized Team Teaching: Negative Compromise." *The NAMTA Quarterly* 3.1 (1977, Fall): 38-40. 2 total pages.

Sample Documents

The following documents illustrate common practices in Montessori school operations. To view documents at full size, photocopy and enlarge.

Employment Application, Franciscan Montessori Earth School (Portland, OR)



FRANCISCAN MONTESSORI EARTH SCHOOL

EMPLOYMENT APPLICATION

NAME ______ SS NUMBER ______

ADDRESS, CITY, STATE ______ ZIP ______

TELEPHONE NUMBER(S) HOME ______ WORK ______ DATE ______

POSITION(S) DESIRED

[ ] ADMINISTRATOR
[ ] DIRECTOR/DIRECTRESS
[ ] ASSISTANT
[ ] CARE ENVIRONMENT SUPERVISOR

[ ] SPECIAL INSTRUCTOR
SPECIALIZED AREA ______
[ ] SUPPORT STAFF
POSITION ______

SALARY RANGE EXPECTED ______

EDUCATIONAL BACKGROUND

COLLEGE/UNIVERSITY ______ LOCATION ______

MAJOR ______ CERTIFICATE/DEGREE ______ DATE ______

MONTESSORI CERTIFICATE ______ DATE ______ LOCATION ______

PREVIOUS EMPLOYMENT

List current or most recent employment first. If more spaces are needed, please complete on a supplemental piece of paper.

EMPLOYER ______ SUPERVISOR ______

ADDRESS ______ TELEPHONE ______

POSITION ______ SALARY ______

DUTIES ______

REASON FOR LEAVING ______ DATES OF EMPLOYMENT ______

MAY WE CONTACT THIS EMPLOYER? [ ] NO [ ] YES CONTACT ______

EMPLOYER ______ SUPERVISOR ______

ADDRESS ______ TELEPHONE ______

POSITION ______ SALARY ______

DUTIES ______

REASON FOR LEAVING ______ DATES OF EMPLOYMENT ______

MAY WE CONTACT THIS EMPLOYER? [ ] NO [ ] YES CONTACT ______

Resume may be attached to this application.

(CONTINUED)

JOB-RELATED REFERENCES

1. NAME ______ OCCUPATION AND JOB RELATEDNESS ______

ADDRESS ______ TELEPHONE ______

2. NAME ______ OCCUPATION AND JOB RELATEDNESS ______

ADDRESS ______ TELEPHONE ______

3. NAME ______ OCCUPATION AND JOB RELATEDNESS ______

ADDRESS ______ TELEPHONE ______

CERTIFICANT OF APPLICANT

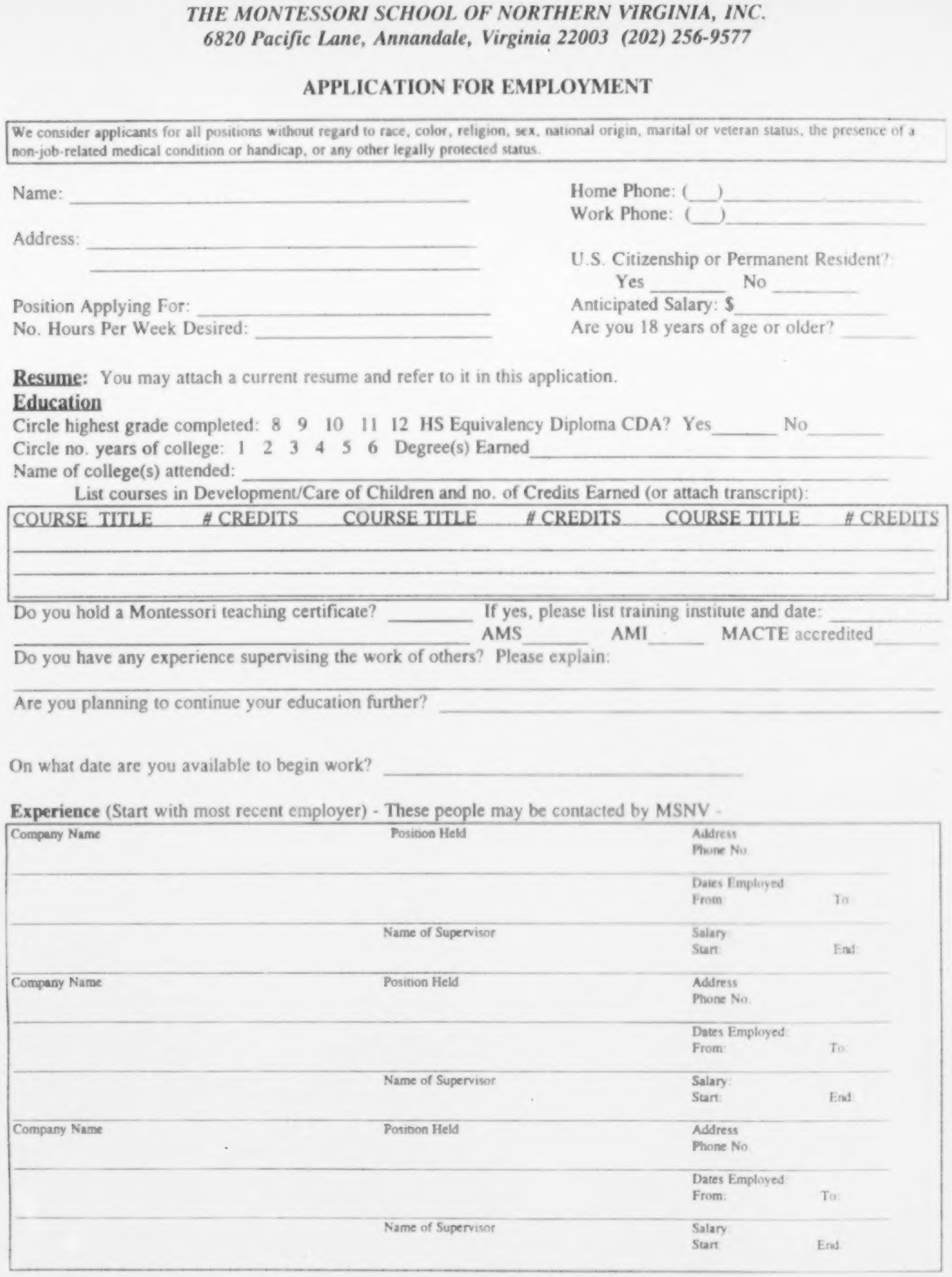
I hereby certify that all answers and statements on this application are true. I have completely set forth my qualifications and experience and I waive the right to present any additional facts at any time in the future during my employment in the event of any review or classification appeal of my employment. I understand that should an investigation disclose willful falsification, my application may be rejected, my name removed from consideration, or if I am employed by the school, the falsification shall be considered sufficient cause for dismissal and termination. You are hereby authorized to make an investigation of my record of any or all of my former employers, with no liability therefor.

APPLICANT'S SIGNATURE ______ DATE ______

It is our policy to hire and promote without regard to race, creed, color, sex or national origin, or mental or physical handicap unrelated to job performance.

This school uses one employment application for all positions in the school. Note the nondiscrimination statement.

Employment Application, Montessori School of Northern Virginia (Annandale, VA)



THE MONTESSORI SCHOOL OF NORTHERN VIRGINIA, INC.
6820 Pacific Lane, Annandale, Virginia 22003 (202) 256-9577

APPLICATION FOR EMPLOYMENT

We consider applicants for all positions without regard to race, color, religion, sex, national origin, marital or veteran status, the presence of a non-job-related medical condition or handicap, or any other legally protected status.

Name: ____________________
Home Phone: (__)____________
Work Phone: (__)____________

Address: ____________________
____

U.S. Citizenship or Permanent Resident?
Yes ________ No ________

Position Applying For: ____________________
Anticipated Salary: $____________
No. Hours Per Week Desired: ____________________
Are you 18 years of age or older? ________

Resume: You may attach a current resume and refer to it in this application.

Education

Circle highest grade completed: 8 9 10 11 12 HS Equivalency Diploma CDA? Yes_______ No________
Circle no. years of college: 1 2 3 4 5 6 Degree(s) Earned____________________
Name of college(s) attended: ____________________

List courses in Development/Care of Children and no. of Credits Earned (or attach transcript):

COURSE TITLE	# CREDITS	COURSE TITLE	# CREDITS	COURSE TITLE	# CREDITS

Do you hold a Montessori teaching certificate? ________ If yes, please list training institute and date: ____________
____________________ AMS_______ AMI______ MACTE accredited_______

Do you have any experience supervising the work of others? Please explain:
____

Are you planning to continue your education further? ____________________

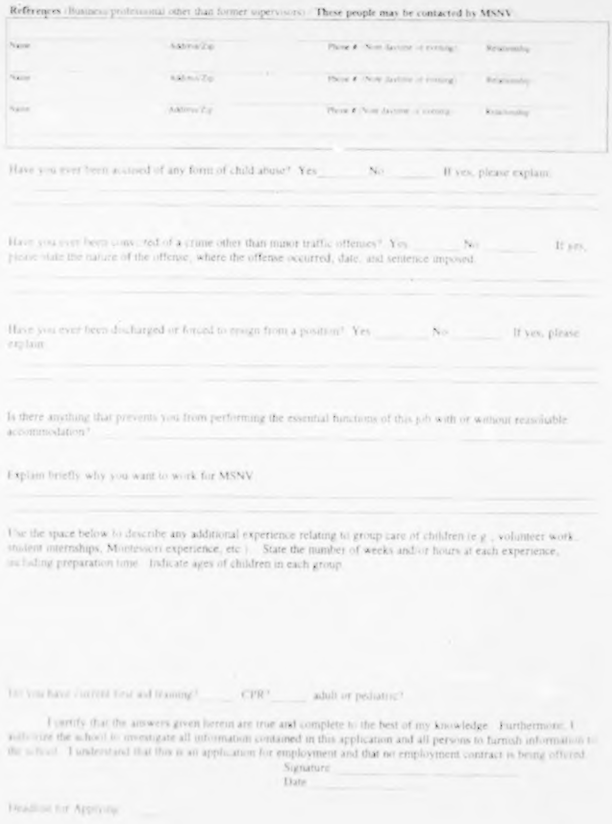
On what date are you available to begin work? ____________________

Experience (Start with most recent employer) - These people may be contacted by MSNV -

Company Name	Position Held	Address Phone No.
		Dates Employed: From: To:
	Name of Supervisor	Salary: Start: End:
Company Name	Position Held	Address Phone No.
		Dates Employed: From: To:
	Name of Supervisor	Salary: Start: End:
Company Name	Position Held	Address Phone No.
		Dates Employed: From: To:
	Name of Supervisor	Salary: Start: End:

This application includes a series of essay-type questions for the applicant to answer in writing. Again, the application prominently displays a nondiscrimination statement.

Employment Application, Montessori School of Northern Virginia (continued)



References (Business/professional other than former supervisors) **These people may be contacted by MSNV**

Name	Address/Zip	Phone # (Note daytime or evening)	Relationship
Name	Address/Zip	Phone # (Note daytime or evening)	Relationship
Name	Address/Zip	Phone # (Note daytime or evening)	Relationship

Have you ever been accused of any form of child abuse? Yes________ No ________ If yes, please explain

Have you ever been convicted of a crime other than minor traffic offenses? Yes ________ No ________ If yes, please state the nature of the offense, where the offense occurred, date, and sentence imposed

Have you ever been discharged or forced to resign from a position? Yes ________ No ________ If yes, please explain

Is there anything that prevents you from performing the essential functions of this job with or without reasonable accommodation?

Explain briefly why you want to work for MSNV

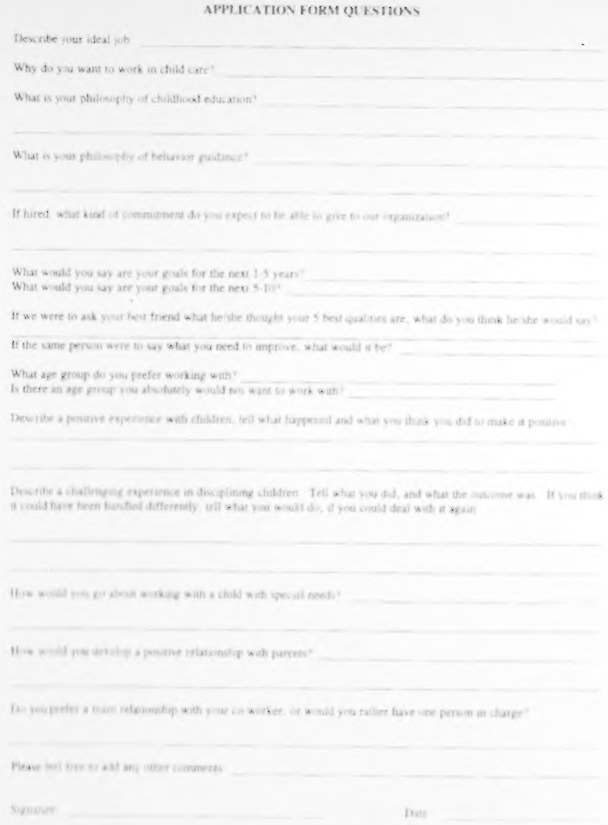
Use the space below to describe any additional experience relating to group care of children (e.g., volunteer work, student internships, Montessori experience, etc.). State the number of weeks and/or hours at each experience, including preparation time. Indicate ages of children in each group

Do you have current first aid training? ______ CPR? ______ adult or pediatric?

I certify that the answers given herein are true and complete to the best of my knowledge. Furthermore, I authorize the school to investigate all information contained in this application and all persons to furnish information to the school. I understand that this is an application for employment and that no employment contract is being offered.

Signature ____________________
Date ____________

Deadline for Applying ______



APPLICATION FORM QUESTIONS

Describe your ideal job ____________________

Why do you want to work in child care? ____________________

What is your philosophy of childhood education? ____________________

What is your philosophy of behavior guidance? ____________________

If hired, what kind of commitment do you expect to be able to give to our organization? __________

What would you say are your goals for the next 1-5 years? ____________________
What would you say are your goals for the next 5-10? ____________________

If we were to ask your best friend what he/she thought your 5 best qualities are, what do you think he/she would say?

If the same person were to say what you need to improve, what would it be? __________

What age group do you prefer working with? ____________________
Is there an age group you absolutely would not want to work with? __________

Describe a positive experience with children, tell what happened and what you think you did to make it positive

Describe a challenging experience in disciplining children. Tell what you did, and what the outcome was. If you think it could have been handled differently, tell what you would do, if you could deal with it again

How would you go about working with a child with special needs? __________

How would you develop a positive relationship with parents? __________

Do you prefer a team relationship with your co-worker, or would you rather have one person in charge?

Please feel free to add any other comments ____________________

Signature ____________________ Date __________

Employment Reference, Montessori School of Northern Virginia (Annandale, VA)

THE MONTESSORI SCHOOL OF NORTHERN VIRGINIA, INC.
6820 Pacific Lane, Annandale, Virginia 22003 (703) 256-9577

EMPLOYMENT REFERENCE

____________________ has applied for a position as a ____________________ and has given your name as a reference. The information which you provide will be held in confidence by us. Your early reply will be sincerely appreciated. Thank you.

____
BETSY MITCHELL, Administrator

Name of Reference: ____________________ **Title:** ____________________
Official relationship to applicant: ____________________

Duties: ____________________
____

Reason for leaving: ____________________

Rate: Excellent Good Fair Poor No Opinion

Ability to apply skills, knowledge: ____________________
Quality of work: ____________________
Communication skills: ____________________
Professionalism: ____________________
Attendance/health: ____________________
Punctuality: ____________________
Responsibility: ____________________
Maturity/stability: ____________________
Judgment: ____________________
Attention to the job: ____________________
Enthusiasm: ____________________
Flexibility: ____________________
Potential for growth: ____________________
Initiative: ____________________
Performance under stress: ____________________
Sense of humor: ____________________
Ability to work with:
  Children: ____________________
  Co-workers: ____________________
  Administrator/Supervisor: ____________________
  Parents: ____________________

Strong points: ____________________
Weak points: ____________________
Supervision needed: ____________________
Do you know of any circumstances or personal traits that would cause the applicant to be an undesirable employee? ____________________

Eligible for rehire? yes ________ no ________
Any other comments:

Signature: ____________________ **Date:** ____________________

This reference-check form is for contacting the reference in writing

Employment Reference, Northwoods Montessori School (Atlanta, GA)

This form is for checking a reference by phone

REFERENCE CHECK Date ____________

Candidate's Name ______________________________

Reference Contacted ______________________________

Position/Relationship to Candidate ____________________

Address: ______________________________

Phone: ____________________

Work History: (duties, responsibilities, advancement, duration)

General Performance Evaluation: (reliable, efficient, conscientious, initiative)

Relationships with Others: (subordinates, peers, supervisors, parents/clients)

Strengths:

Weaknesses: (past or potential problems)

Reason for Leaving:

Would you rehire the candidate?

Please comment:

general health & energy level ____________________

emotional stability ____________________

open-ness to critique ____________________

creativity ____________________

organization ____________________

professionalism ____________________

If candidate was employed as a teacher, please comment:

knowledge of theory and curriculum -

classroom management -

preparation/record keeping

teacher/child relationships -

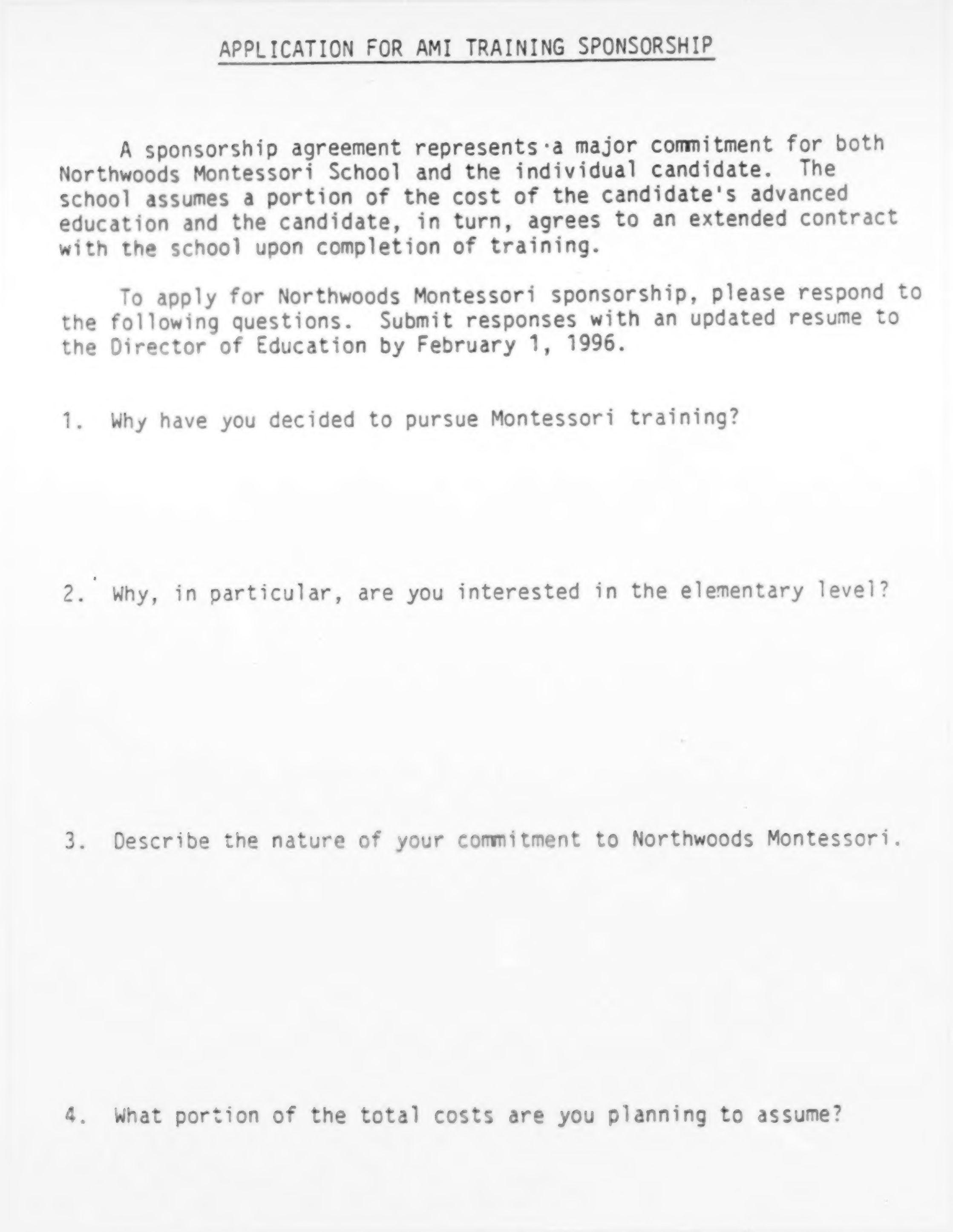
teacher/peer relationships -

teacher/parent relationships -

teacher/administration relationships -

Additional Comments:

Sponsorship Application, Northwoods Montessori School (Atlanta, GA)



APPLICATION FOR AMI TRAINING SPONSORSHIP

A sponsorship agreement represents a major commitment for both Northwoods Montessori School and the individual candidate. The school assumes a portion of the cost of the candidate's advanced education and the candidate, in turn, agrees to an extended contract with the school upon completion of training.

To apply for Northwoods Montessori sponsorship, please respond to the following questions. Submit responses with an updated resume to the Director of Education by February 1, 1996.

1. Why have you decided to pursue Montessori training?

2. Why, in particular, are you interested in the elementary level?

3. Describe the nature of your commitment to Northwoods Montessori.

4. What portion of the total costs are you planning to assume?

This application for training sponsorship elicits the applicant's motivation, goals, and commitment to the school.

Sponsorship Agreement, The Post Oak School (Bellaire, TX)

A well-thought-out agreement, this form breaks down the loan into use categories: tuition, housing, and travel. Alternatively, some agreements list the loan as a single amount.

POST OAK SCHOOL TEACHER TRAINEE AGREEMENT

This agreement is made as of this Wednesday, May 28, 1997, by and between Post Oak School (hereinafter referred to as "School"), a not-for-profit Texas corporation located at 4600 Bissonnet Street, Bellaire, Texas 77401, and ______________ (hereinafter referred to as "Trainee").

It is agreed to by and between the above parties as follows:

1. School does loan Trainee the following amounts to be used as follows:

Tuition
Housing
Travel
Total (hereinafter referred to as the "Loan Amount")

Said Loan Amount is to be used by Trainee solely for attendance and participation in the Montessori training program offered at Cleveland, Ohio, into which program Trainee has demonstrated to the satisfaction of School that he/she has been accepted.

2. Trainee shall enroll in the Montessori training program offered at the aforesaid institution, and shall use his/her best efforts to satisfactorily complete said training and shall provide School with evidence of actual enrollment and of satisfactory completion of said training. Failure to enroll in above referenced training program shall result in Loan Amount becoming due and payable to School immediately. Failure to use Loan Amount solely for the above stated purpose for which Loan Amount is being made available to Trainee shall result in Loan Amount becoming due and payable to School immediately.

3. Trainee agrees, at the option of and subject to the needs of the School, to teach a class at School for a minimum of three school years commencing with the first school year following training.

4. Should Trainee not be offered a teaching position at School, or should Trainee resign a teaching position at School, or should Trainee be terminated for justifiable cause from teaching position at School, the following schedule shall be used to determine what portion of the Loan Amount shall become subject to repayment to School.

Termination of employment before or during the first school year following training:
Full Loan Amount to be repaid to School.

Termination of employment during the second school year following training:
Two-thirds (2/3) of the Loan Amount to be repaid to School.

Termination of employment during the third school year following training:
One-third (1/3) of Loan Amount to be repaid to School.

Termination of employment following the third school year following training:
No portion of Loan Amount to be repaid to School.

Any amount to be repaid to the School as determined in accordance with the above repayment schedule shall bear interest at the rate of "Prime (see definition following) plus 1%" and shall accrue from the date Loan Amount or portion thereof is first made available to or is paid on behalf of Trainee. "Prime" is defined as the prime interest rate as published by the Wall Street Journal from time to time as of or closest to the date that any portion of the Loan Amount is made available to or is paid on behalf of Trainee. Any portion of the Loan Amount to be repaid to the School in accordance with this provision shall be repaid in equal monthly installments for a period not to exceed eighteen (18) months. Further, Trainee agrees to reimburse School for the costs of any attorney's and/or collection fees incurred by the School as a result of efforts to enforce this agreement.

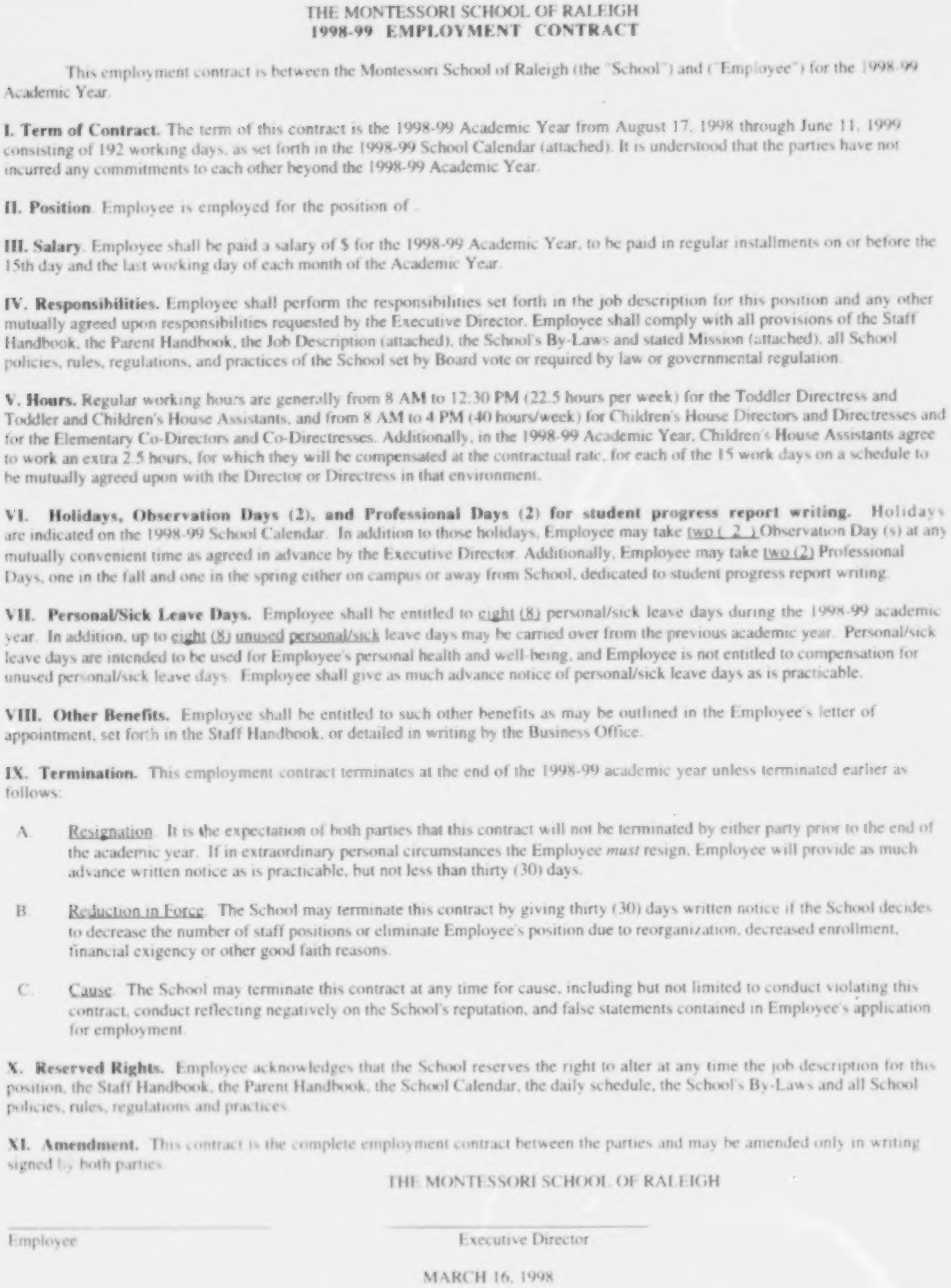
5. Trainee acknowledges that nothing in this agreement shall be construed as a guarantee of employment or as an offer of employment by the School to Trainee.

Agreed to and accepted this ____ day of ________________, 19__

______________________	______________________
Trainee	Head of School

BEST COPY AVAILABLE

Employment Contract, Montessori School of Raleigh (Raleigh, NC)



THE MONTESSORI SCHOOL OF RALEIGH
1998-99 EMPLOYMENT CONTRACT

This employment contract is between the Montessori School of Raleigh (the "School") and ("Employee") for the 1998-99 Academic Year.

I. Term of Contract. The term of this contract is the 1998-99 Academic Year from August 17, 1998 through June 11, 1999 consisting of 192 working days, as set forth in the 1998-99 School Calendar (attached). It is understood that the parties have not incurred any commitments to each other beyond the 1998-99 Academic Year.

II. Position. Employee is employed for the position of .

III. Salary. Employee shall be paid a salary of $ for the 1998-99 Academic Year, to be paid in regular installments on or before the 15th day and the last working day of each month of the Academic Year.

IV. Responsibilities. Employee shall perform the responsibilities set forth in the job description for this position and any other mutually agreed upon responsibilities requested by the Executive Director. Employee shall comply with all provisions of the Staff Handbook, the Parent Handbook, the Job Description (attached), the School's By-Laws and stated Mission (attached), all School policies, rules, regulations, and practices of the School set by Board vote or required by law or governmental regulation.

V. Hours. Regular working hours are generally from 8 AM to 12:30 PM (22.5 hours per week) for the Toddler Directress and Toddler and Children's House Assistants, and from 8 AM to 4 PM (40 hours/week) for Children's House Directors and Directresses and for the Elementary Co-Directors and Co-Directresses. Additionally, in the 1998-99 Academic Year, Children's House Assistants agree to work an extra 2.5 hours, for which they will be compensated at the contractual rate, for each of the 15 work days on a schedule to be mutually agreed upon with the Director or Directress in that environment.

VI. Holidays, Observation Days (2), and Professional Days (2) for student progress report writing. Holidays are indicated on the 1998-99 School Calendar. In addition to those holidays, Employee may take two (2) Observation Day (s) at any mutually convenient time as agreed in advance by the Executive Director. Additionally, Employee may take two (2) Professional Days, one in the fall and one in the spring either on campus or away from School, dedicated to student progress report writing.

VII. Personal/Sick Leave Days. Employee shall be entitled to eight (8) personal/sick leave days during the 1998-99 academic year. In addition, up to eight (8) unused personal/sick leave days may be carried over from the previous academic year. Personal/sick leave days are intended to be used for Employee's personal health and well-being, and Employee is not entitled to compensation for unused personal/sick leave days. Employee shall give as much advance notice of personal/sick leave days as is practicable.

VIII. Other Benefits. Employee shall be entitled to such other benefits as may be outlined in the Employee's letter of appointment, set forth in the Staff Handbook, or detailed in writing by the Business Office.

IX. Termination. This employment contract terminates at the end of the 1998-99 academic year unless terminated earlier as follows:

A. Resignation. It is the expectation of both parties that this contract will not be terminated by either party prior to the end of the academic year. If in extraordinary personal circumstances the Employee *must* resign, Employee will provide as much advance written notice as is practicable, but not less than thirty (30) days.

B. Reduction in Force. The School may terminate this contract by giving thirty (30) days written notice if the School decides to decrease the number of staff positions or eliminate Employee's position due to reorganization, decreased enrollment, financial exigency or other good faith reasons.

C. Cause. The School may terminate this contract at any time for cause, including but not limited to conduct violating this contract, conduct reflecting negatively on the School's reputation, and false statements contained in Employee's application for employment.

X. Reserved Rights. Employee acknowledges that the School reserves the right to alter at any time the job description for this position, the Staff Handbook, the Parent Handbook, the School Calendar, the daily schedule, the School's By-Laws and all School policies, rules, regulations and practices.

XI. Amendment. This contract is the complete employment contract between the parties and may be amended only in writing signed by both parties.

THE MONTESSORI SCHOOL OF RALEIGH

Employee

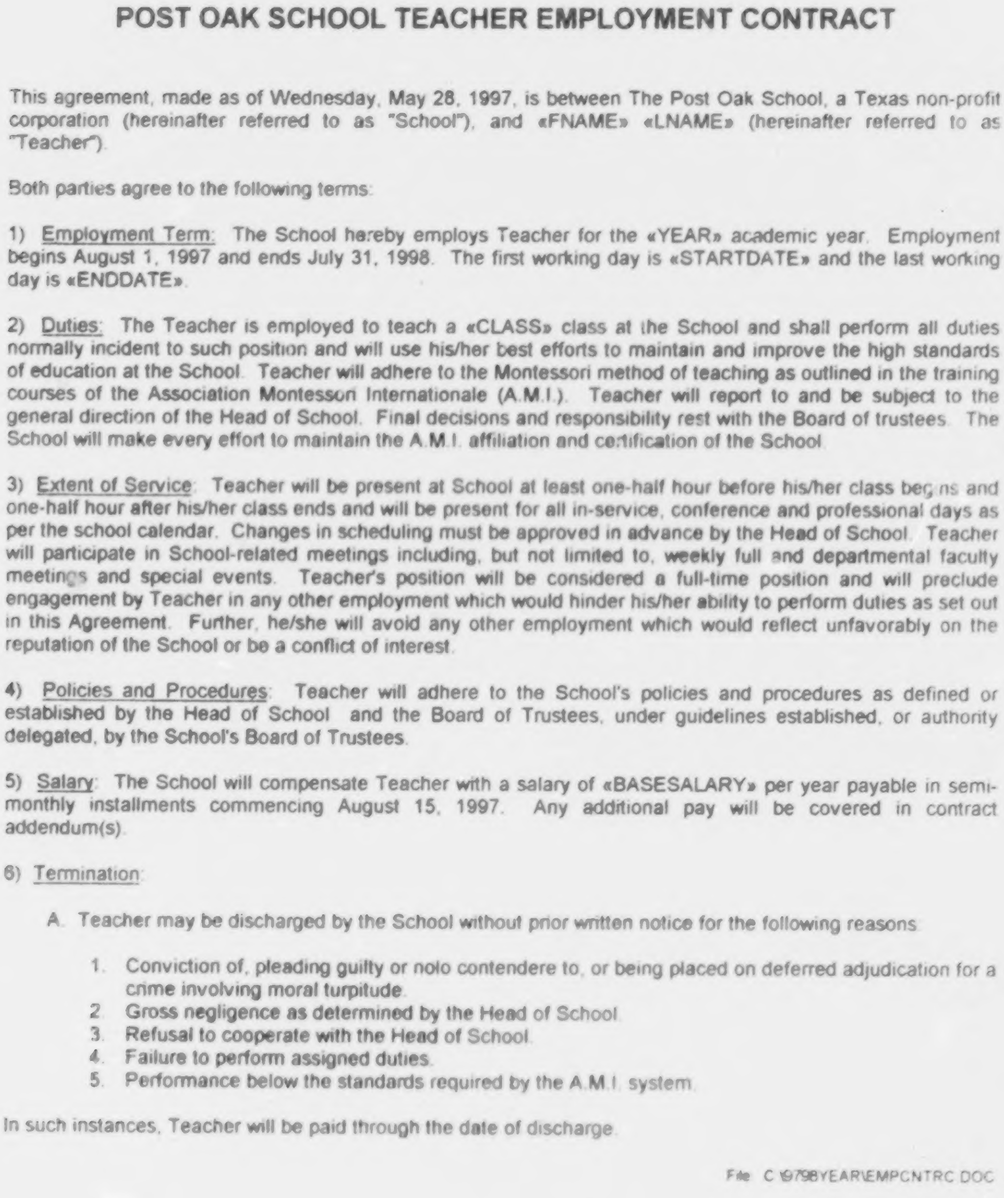
Executive Director

MARCH 16, 1998

This succinct contract is the basis for all contracts developed at the school.

9. Hiring and

Employment Contract, The Post Oak School (Bellaire, TX)



POST OAK SCHOOL TEACHER EMPLOYMENT CONTRACT

This agreement, made as of Wednesday, May 28, 1997, is between The Post Oak School, a Texas non-profit corporation (hereinafter referred to as "School"), and «FNAME» «LNAME» (hereinafter referred to as "Teacher").

Both parties agree to the following terms:

1) Employment Term: The School hereby employs Teacher for the «YEAR» academic year. Employment begins August 1, 1997 and ends July 31, 1998. The first working day is «STARTDATE» and the last working day is «ENDDATE».

2) Duties: The Teacher is employed to teach a «CLASS» class at the School and shall perform all duties normally incident to such position and will use his/her best efforts to maintain and improve the high standards of education at the School. Teacher will adhere to the Montessori method of teaching as outlined in the training courses of the Association Montessori Internationale (A.M.I.). Teacher will report to and be subject to the general direction of the Head of School. Final decisions and responsibility rest with the Board of trustees. The School will make every effort to maintain the A.M.I. affiliation and certification of the School.

3) Extent of Service: Teacher will be present at School at least one-half hour before his/her class begins and one-half hour after his/her class ends and will be present for all in-service, conference and professional days as per the school calendar. Changes in scheduling must be approved in advance by the Head of School. Teacher will participate in School-related meetings including, but not limited to, weekly full and departmental faculty meetings and special events. Teacher's position will be considered a full-time position and will preclude engagement by Teacher in any other employment which would hinder his/her ability to perform duties as set out in this Agreement. Further, he/she will avoid any other employment which would reflect unfavorably on the reputation of the School or be a conflict of interest.

4) Policies and Procedures: Teacher will adhere to the School's policies and procedures as defined or established by the Head of School and the Board of Trustees, under guidelines established, or authority delegated, by the School's Board of Trustees.

5) Salary: The School will compensate Teacher with a salary of «BASESALARY» per year payable in semi-monthly installments commencing August 15, 1997. Any additional pay will be covered in contract addendum(s).

6) Termination:

A. Teacher may be discharged by the School without prior written notice for the following reasons:

1. Conviction of, pleading guilty or nolo contendere to, or being placed on deferred adjudication for a crime involving moral turpitude.
2. Gross negligence as determined by the Head of School.
3. Refusal to cooperate with the Head of School.
4. Failure to perform assigned duties.
5. Performance below the standards required by the A.M.I. system.

In such instances, Teacher will be paid through the date of discharge.

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This contract is very comprehensive.

Employment Contract, The Post Oak School (continued)

B. This Agreement may be terminated by the School or Teacher for any other reason by giving written notice to the other party at least 30 days before the effective date of the termination. In this instance, Teacher will be compensated through the termination date.

C. The death of Teacher shall terminate this Agreement effective on the date of death. In this case, the School will pay the estate of Teacher the amount of salary accrued through the date of death.

D. In the event of a disability due to sickness, physical or mental disability or other disability as a result of which Teacher reasonably appears unable to complete his/her duties hereunder, the School may terminate this Agreement upon giving Teacher written notice 30 days before the termination date.

7) Benefits. The benefits to which Teacher is entitled are as follows:

A. Eligibility for participation in medical and dental insurance plans for which the School will pay «GRPINS» of the premium for the employee's coverage. Employee has option, per plan provisions, to purchase dependent care coverage, the cost of which is paid entirely by employee.
B. Eligibility for participation in disability insurance plan as per plan provisions.
C. Eligibility for participation in Section 125 plan as per plan provisions.
D. Eligibility for participation in 401K plan as per plan provisions.
E. Payment of conference and training fees and expenses upon approval by the Head of the School not to exceed the amount of «TRAVEL».
F. Payment by the School for first aid and CPR training as required by TDHR and payment of AMI/USA dues.
G. Post Oak School tuition scholarships for Teacher's dependent children in accordance with school policy. If the tuition(s) and any required fees are not paid by August 1, 1997, Teacher agrees that the school may withhold such amounts from Teacher's paychecks such that all amounts due school are collected by May 15th.
H. Vacation as per school calendar for Teacher's class.
I. Sick or personal leave of eight days per year to be used at Teacher's discretion. Teacher will be paid by July 31, 1998 at the rate of $50.00 per day for any sick or personal leave not taken. In addition, professional leave to attend conference and training sessions will be allowed at the discretion of the Head of the School.

8) School Documents. All files, work records, documents, drawing materials and equipment (with the exclusion of teaching materials and equipment owned by the Teacher) and similar items relating to the business of the School shall be and remain the exclusive property of the School.

9) Notices. All notices mentioned herein must be in writing and are considered to be effective either the day personally delivered, the day postmarked, the day faxed, or the day telegraphed. Addresses to which such notices are to be delivered are as follows:

Teacher ______________________________
____
____
Fax # ______________________________

School
The Post Oak School
4600 Bissonnet
Bellaire, TX 77401
Fax # 713/661-4959

10) Severability. Each provision of this Agreement shall be interpreted in such manner as to be effective and valid under applicable law, but if any provision of this Agreement shall be prohibited by or invalid under applicable law, such provision shall be ineffective only to the extent of such provision or invalidity, without invalidating the remainder of such provision or the remaining provisions of this Agreement.

11) Entire Agreement. This Agreement and any addendums, together, constitute the entire agreement of the parties hereto, and supersede all prior understanding with respect to the subject matter hereof.

12) Assignment. This Agreement may not be assigned by Teacher.

13) Binding Effect. Subject to all provisions hereof this Agreement shall be binding upon and inure to the benefit of the parties hereto, and to the successors and assigns of School.

14) Captions. The section headings in this Agreement are for reference purposes only and shall not affect in any way the meaning or interpretation of this Agreement.

15) Governing Law. This Agreement shall be construed and enforced in accordance with and governed by the laws of the State of Texas.

16) Counterparts. This Agreement may be executed in multiple, original counterparts, each of which shall be deemed an original, but all of which together shall constitute the same instrument.

All members of the teaching and administrative staff will maintain an attitude of loyalty to the School, respect for each other, the parents, and most importantly the children. All those involved in the School community are expected to be mutually supportive, open, and committed to the goal of normalization for every child.

Agreed to and accepted this _______ day of __________, 19____.

____
Teacher

____
Head of School

Assistant Contract, Metropolitan Montessori School (New York, NY)

This contract is written specifically for a classroom assistant and conveys the importance of this position within the school community.

Metropolitan Montessori School
325 West 85th Street, New York, NY 10024 (212) 579-5525

Re: Your Employment as Assistant Teacher for the School Year 1998-1999

Dear ,

This letter will serve to confirm the understanding between the **Metropolitan Montessori School** (the "School") and you (the "Assistant Teacher") concerning your employment by the School for the school year set forth above.

1 The School will employ you as an Assistant Teacher and you will accept employment in that position during the school year 1998-1999. The school year begins on Tuesday, September 1st, 1998, and terminates on the 16th day of June, 1999.

2 The school agrees that it will pay to the Assistant Teacher a salary at the rate of $ for the school year in 18 semimonthly installments concluding on May 31st. One lump sum payment will be made equivalent to 2/20 of the total salary on June 15th. The salary check which will be paid on June 15th will constitute payment for the period of employment June 1-15, 1999 and paid vacation from June 16th through June 30, 1999.

3 The Assistant Teacher understands and agrees that the salary payment schedules set forth above have been set forth solely for convenience and do not, either expressly or impliedly, indicate less than 10 months' employment for the Assistant Teacher. If before the end of the school year it is determined that the Assistant Teacher will return for the following school year, the benefit package for the Assistant Teacher will be continued during July and August.

4 The Assistant Teacher will perform duties under the supervision and direction of the Head Teacher. The Assistant Teacher will arrive at the School building no later than 8:00 a.m. and will remain until no earlier than 1:00 p.m. The Assistant Teacher may be asked to attended staff meetings and/or material making sessions each week at such hours as may reasonably be requested by the Head Teacher and to attend such other and further meetings as may be necessary for proper performance of duties.

5 The Assistant Teacher agrees to loyally support the welfare and aims of the School, under the direction of the administration, to confer with parents upon reasonable request, and to participate in all School functions as may be reasonably required of the Assistant Teacher by the Administrator.

6 If the Assistant Teacher is unable, or otherwise fails for any reason, to perform the duties required herein by reason of illness or any other cause for more than ten (10) class days during any school year, the School may make proportionate salary adjustments to reflect such inability or failure in excess of ten (10) class days.

7 The Assistant Teacher specifically agrees that the School may terminate this Agreement for such cause as the School, in its sole discretion, will determine upon one (1) month's notice of such termination or upon payment of two (2) semimonthly installments provided for in paragraph 2 above, whichever is selected by the Administrator.

8 The School agrees that the Assistant Teacher will be entitled to participate in every faculty benefit program generally available for Teachers at the School, including hospitalization, major medical, and long-term disability insurance, and such other programs as may from time to time be established by the School in accordance with the terms and conditions thereof. The Assistant Teacher agrees, however, that no vested or continuing interest in any such program, except as specified therein, shall devolve upon the Assistant Teacher, nor shall participation in any such program constitute any further term of employment or any extension of this employment agreement.

Once again, may I say how pleased we are that you will be a part of our staff for the coming year. Your signed acceptance and return to me of one copy of this letter will have the force of contract.

Very truly yours,

METROPOLITAN MONTESSORI SCHOOL

Administrator

Date

ACCEPTED AND AGREED

Assistant Teacher

Date

Job Description: Head of School, Independent School Management

Comprehensive Headship: Job Description

A Board of Trustees is the policy-making body of a private-independent school. It is responsible for fiscal well-being, for the philosophy and objectives of the institution (and their constant review for pertinence), and for the effective implementation of the policies that it lays down. To this end, it selects a Head to whom it delegates administrative functions.

General

The Head carries out the broad educational policies established by the Board and acts within the limits of the financial policy set by that body. Within these basic guidelines the Head determines the methods for carrying out Board policies, creates operational policy, oversees the business operation, develops and evaluates student programs and services, provides administrative and professional leadership for faculty and staff, orchestrates external relations, and has responsibility for the day-to-day operation. Specifically, the Head is accountable for:

Board Relationships

- Brings to the attention of the Board such matters and data as are appropriate to keep the Board fully informed to meet its responsibilities. This includes suggestions for broad policy development as well as strategies for institutional betterment.
- Maintains contact with the Board President to assure that there are "no surprises." (It is expected that the President will also keep the Head fully apprised of Board concerns and data.)
- Functions as chief advisor to the Board, guiding it in the full range of its activities. (In turn, Trustee and Board committees are expected to support and augment the Head and the management team.)
- Suggests philosophic positions appropriate to the changes which occur in the community and students served.
- Serves as chief communicator between the Board and the faculty and staff.

Organization

- Creates and nurtures an appropriate and strong management team. The Head is expected to share with and delegate to his or her immediate subordinates such that this group is prepared to collectively lead the institution should the Head suddenly become incapacitated.
- Promotes an internal organization that permits effective communication—up and down.
- Works to produce smooth day-to-day internal operation.

Planning and Analysis

- Develops tactical plans with the help of key members of the management team. Together they initiate studies of pertinent data (financial, enrollment, academic performance ...) to facilitate and inspire such plans.
- Encourages perspective via testings, comparisons with similar institutions, and external analyses/critiques.
- Remains abreast of trends and research in education—particularly those affecting private-independent operation and management.
- Prods the Board to undertake periodic, systematic, long-range planning.

Programs

- Designs, implements, and administers student programs and services—appropriate to the needs of those enrolled—and develops systems of scheduling to accommodate these programs and services.
- Sets standards of participation and achievement in each category:
    - **Academic:** Establishes the educational offerings as well as appropriate systems to guide students and evaluate achievement. The curriculum must have continuity and be capped by appropriate placement of graduates.

This document provides an excellent basis for any administrative job description. Courtesy of Independent School Management, Inc., Wilmington, DE (see Appendix 4 for contact information).

Job Description: Head of School, Independent School Management (continued)

Co-Curricular: Organizes activities, elective offerings of a para-academic nature, formal cultural exposures, and athletics sufficient to round out the school's academic program and provide for student interest development.

Character Development: Implements formal and informal programs that relate to high moral and ethical conduct. This includes counseling and advisory programs, a disciplinary structure that is administered fairly, and a mechanism for coordinated psychological assistance in the event of student need.

Student Life: Establishes and oversees programs for after-hours and weekends, including dorm parenting, extended day care, and recreational/cultural activities.

Personnel

- Devises the teaching and non-teaching positions needed to implement the school's programs, and selects and employs competent personnel to fill these positions.
- Administers equitable systems of compensation, working conditions, discipline, training, and development for all school employees.
- Determines standards and takes appropriate steps to measure and maintain reasonable performance and professional growth among immediate subordinates and, through them, all employees; dismisses those who fail to meet the standards.
- Establishes practices and procedures to promote harmonious and constructive relationships among all personnel.
- Maintains personal contact with employees (all of them, if size permits) to foster good relations, promote high morale, and identify personnel problems as early as possible. And encourages similar contact on the part of subordinates.

Program and Service Support

- Administers efforts that provide sufficient support for student programs. This encompasses general equipment and facilities as well as technological and electronic systems.
- Assures that a comprehensive set of records is maintained in accordance with the needs of the school, its constituents, and the government.

Environment

- Holds general operating responsibility for the safety and well-being of all students under the school's jurisdiction.
- Approves and administers rules and procedures governing the student body.
- Works to promote harmonious and constructive relationships among and between students, faculty, and administrators—recognizing the importance of the development of each individual.
- Strives to create and maintain an aesthetically attractive environment that is compatible with the character of the institution.

Finance

- Presents financial plans and annual budgets to the Finance Committee of the Board to achieve the objectives of the school.
- Maintains a system of cost control to foster efficiency consistent with high standards of education and the limitations of the budget.
- Manages a cost-effective system of purchasing, billing, accounting, investing, and insurance.
- Recommends tuition rates and salary adjustments annually.

Job Description: Head of School, Independent School Management (continued)

Enrollment and Recruitment

- Recommends enrollment objectives with respect to student numbers, character, and quality—and executes programs to achieve them.
- Remains abreast of effective marketing concepts and techniques that apply to private-independent schools, and oversees their implementation.
- Establishes standards and procedures for student admissions and dismissals.
- Recommends a suitable scholarship and grant-in-aid program to Board of Trustees and executes that program.

Fund Raising

- Advises the Board with respect to fund-raising needs and plans.
- Proposes realistic goals for annual, capital, and deferred giving programs.
- Coordinates fund-raising efforts and events and becomes personally involved in the cultivation and solicitation of major prospects, as needed.

Constituent Relations

- Encourages meaningful alumni, parent, and past parent participation in events that aid and support the goals of the school.
- Responds to special-interest groups, giving them direction while stressing the needs of all students.
- Works to maintain programs that contribute to relations with the local community—particularly with those people who come into regular contact with the school.
- Maintains constructive liaison with other educational institutions and associations.

Constitutional Image

- Interprets the school and its programs to the public and strives to become the personification of the institution.
- Functions as spokesperson for the school.

Auxiliary Services and Programs

- Identifies special services that are either necessities or worthwhile conveniences to those who seek out the school (transportation, student store, food service, health service, security ...).
- Suggests to the Board any supplemental enterprises that are compatible with the school operation and which give promise of financial surplus, effective utilization of plant and personnel, and/or significant public relations exposure.

Plant Management

- Supervises the operation and maintenance of all school facilities.
- Within budget limits, approves expenditures for operation and maintenance.
- Recommends changes or additions necessary to implement student programs or to maintain desired standards of appearance, safety, and adequacy.
- Endeavors to see that the plant accommodates the program rather than dictates the program or means of operation.

These two job descriptions illustrate the division of responsibilities between an executive director and an educational director (here called curriculum coordinator)

Administrative Job Descriptions, Montessori School of Raleigh (Raleigh, NC)

THE MONTESSORI SCHOOL OF RALEIGH

JOB DESCRIPTION

EXECUTIVE DIRECTOR

The Executive Director is the Chief Executive Officer of the School. The Executive Director is the School's educational leader and visionary. S/he is hired by the Board of Trustees to oversee the day to day operation of the School and to implement Board policy.

To that end, the Executive Director ("Head of School") endeavors in every action to enable the school community to fulfill the stated Mission of the School (attached) and:

- to provide moral, intellectual, and educational leadership of the highest order, taking personal and professional responsibility for creating, sustaining, and nurturing the most engaging educational environment while maintaining and implementing educational programs characteristic of exemplary schools.

- to take command, to define issues, and to persue an uncluttered agenda with purpose and clarity.

Adhering to the Principles of Good Practice for Heads set out by the National Association of Independent Schools, the Executive Director:

- shapes and upholds, with the Board of Trustees, the School's mission, goals, and objectives and articulates them to the school's constituencies and the wider community. To that end, the Head guides the Board in formulating the School's mission and in developing its strategic and/or Long Range Plan. The Head articulates the Mission of the School to its constituencies and is the School's greatest and most visible advocate and spokesperson. The Head has the duty to report to the Board on School matters and is accountable to the Board for effective, business like management of the School;

- attracts well-qualified faculty and staff and retains them through equitable compensation plans, sound staff development and evaluation programs, and concern for their growth within the School and in the larger community. The Head is responsible for the professional quality and behavior of the Faculty and has complete responsibility for Faculty, staff, and student selection, evaluation, and dismissal;

- works with the Faculty and staff to examine the needs of students and to put in place programs and policies to meet those needs;

- is ultimately responsible for all administrative decisions and actions and is responsible for building and maintaining a strong leadership team. The Head regularly involves members of the administration and faculty in decision making and evaluation.

- is accessible, within reason, and responsive to all constituencies -- faculty, parents, students, and alumni -- and in particular ensures that parents are kept informed about the School's policies, programs, and the progress of their children;

- is responsible for the health and safety of students, administrators, faculty, and staff while they are under the School's jurisdiction. The Head makes sure that the School satisfies the health and safety requirements of state and local authorities;

- identifies ways to serve graduates and to retain their loyalty as advocates of the School and as contributors to its financial strength and well-being;

- oversees the well-being of the entire School, rather than of any constituency, and works to help all constituencies to see the School as part of a network of local, state, regional, and national organizations concerned with educational issues and excellence;

- as steward of the School's resources, is responsible for prudent budgeting and financial management, maintenance of the physical plant, long-range planning and its implementation and review, and fund raising, both annual and capital. The Head prepares and carries out the operating plan and the annual budget, which is the School's annual statement of priorities;

- is alert to changing patterns in the local community, especially those that may affect enrollment or diversity within the School, and ensures that admission and hiring policies adhere to the School's written policies on nondiscrimination and due process. The Board delegates responsibility for admitting students to the Head who, with the Director of Admission, has the sole right to decide on student admission as long as decisions are consonant with Board policy. Financial aid policies, once established, are also delegated to the Head;

- is alert to educational trends and issues locally, regionally, and nationally and helps to interpret their significance to the Board, administration, faculty, parents, and extended School community;

- works with the Board Chair to enable the Board to carry out its responsibilities. To that end, the Head and the Board Chair jointly plan the Board calendar for the year, draw up the agendas of Board meetings, and make arrangements for keeping each Trustee and each constituency informed about the School;

- asks the Trustees for an annual evaluation. As part of Board development, the Head ensures that the Trustees evaluate the School periodically on its operation in relation to stated goals and Mission and that they review periodically their own functioning as a Board;

- finds ways to become and remain part of a network of peers who can provide personal support and professional assistance;

- cooperates with the Heads of other independent schools to ensure that good relations among schools are protected, especially in the four sensitive areas of admission, marketing, faculty recruitment and fund raising.

(We gratefully acknowledge the NAIS "Principles of Good Practice" for Heads as well as the NAIS Trustee Handbook for the language on which this job description is based.)

Rev. 5/97

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Administrative Job Descriptions, Montessori School of Raleigh (continued)

The Montessori School of Raleigh
JOB DESCRIPTION

CURRICULUM COORDINATOR

The Curriculum Coordinator's primary role is two-fold: (1) to sustain and nourish a skilled, experienced faculty of 44 in their work with children, parents, curriculum, and colleagues, and; (2) to assure the integrity and quality of the scope and sequence of the educational program from Toddler through Middle School. To that end, the Curriculum Coordinator works hard to maximize coordination and communication between the many people, elements, and components that comprise MSR's educational program.

The Curriculum Coordinator in this top-management, 12-month administrative position is an integral part of a strong educational team and helps provide forward-looking leadership for an exemplary Montessori program. To that end, he is aware of educational issues and trends in both the world of Montessori and the world of conventional education, and helps the School anticipate and respond to those issues and trends as they impact the evolving needs of children and the School.

The Curriculum Coordinator reports directly to the Executive Director and is responsible for the school in his absence.

With the Executive Director the Curriculum Coordinator will help the School begin to implement the educational elements of an ambitious Long Range Plan that includes: the addition of a second section of Upper Elementary by the fall of 1997, a second Toddler class by fall, 1996, the implementation of a Middle School (Grades 7 - 9) program on a separate campus by fall, 1999, and in-depth discussions regarding such issues as student learning-style needs (and strategies to respond to them), innovative science instruction, and the use of technology in the Montessori environment.

The Curriculum Coordinator insures the integrity of the educational program from Toddler through Middle School. He maintains and oversees the full scope and sequence of the curriculum and compares it with state and national standard to make certain that MSR meets or exceed standard in all areas. With the scope and sequence in place, the Curriculum Coordinator helps provide strategies and templates for regular progress reporting to parents and students, as well as record-keeping methods for the staff. Additionally, s/he helps to oversee a regular accreditation process and responses to accreditation recommendations.

The Curriculum Coordinator is an accomplished Montessori guide, a "guide's guide" with Montessori certification at both the Primary (3-6) and Elementary (6-12) levels. Knowledge of psycho-educational evaluation; an understanding of various learning styles; experience with progress reporting, parent-teacher conferencing, and parent education; insight into issues surrounding each point of student transition, and; an academic and/or practical knowledge of the full scope and sequence of the Montessori curriculum from Infant/Toddler through 12-15 (Erdkinder) are important.

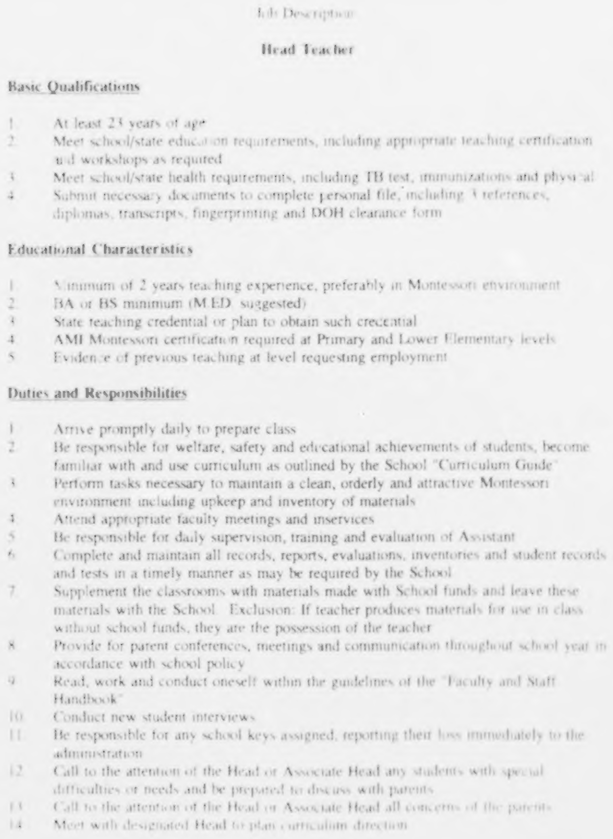
An understanding of and respect for AMI and AMS training, philosophy, and approach are critical, as are strong communication and interpersonal skills.

The Curriculum Coordinator, with the Head of School, will be aware of and will "live" the NAIS Principles of Good Practice for "Supervisors of Teachers" (attached).

Revised August, 1997

Job Description: Head Teacher, Metropolitan Montessori School (New York, NY)

This description of the responsibilities of the head teacher is very concise and concrete



Job Description

Head Teacher

Basic Qualifications

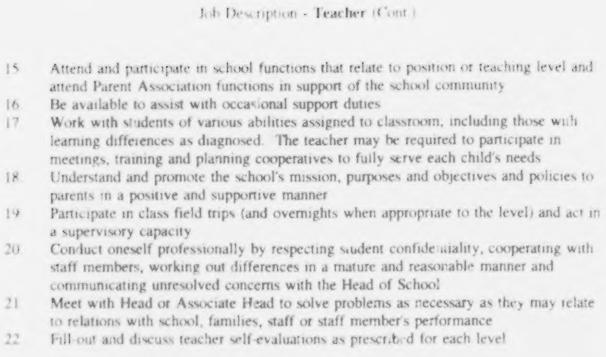
1. At least 23 years of age
2. Meet school/state education requirements, including appropriate teaching certification and workshops as required
3. Meet school/state health requirements, including TB test, immunizations and physical
4. Submit necessary documents to complete personal file, including 3 references, diplomas, transcripts, fingerprinting and DOH clearance form

Educational Characteristics

1. Minimum of 2 years teaching experience, preferably in Montessori environment
2. BA or BS minimum (M.ED. suggested)
3. State teaching credential or plan to obtain such credential
4. AMI Montessori certification required at Primary and Lower Elementary levels
5. Evidence of previous teaching at level requesting employment

Duties and Responsibilities

1. Arrive promptly daily to prepare class
2. Be responsible for welfare, safety and educational achievements of students, become familiar with and use curriculum as outlined by the School "Curriculum Guide"
3. Perform tasks necessary to maintain a clean, orderly and attractive Montessori environment including upkeep and inventory of materials
4. Attend appropriate faculty meetings and inservices
5. Be responsible for daily supervision, training and evaluation of Assistant
6. Complete and maintain all records, reports, evaluations, inventories and student records and tests in a timely manner as may be required by the School
7. Supplement the classrooms with materials made with School funds and leave these materials with the School. Exclusion: If teacher produces materials for use in class without school funds, they are the possession of the teacher
8. Provide for parent conferences, meetings and communication throughout school year in accordance with school policy
9. Read, work and conduct oneself within the guidelines of the "Faculty and Staff Handbook"
10. Conduct new student interviews
11. Be responsible for any school keys assigned, reporting their loss immediately to the administration
12. Call to the attention of the Head or Associate Head any students with special difficulties or needs and be prepared to discuss with parents
13. Call to the attention of the Head or Associate Head all concerns of the parents
14. Meet with designated Head to plan curriculum direction

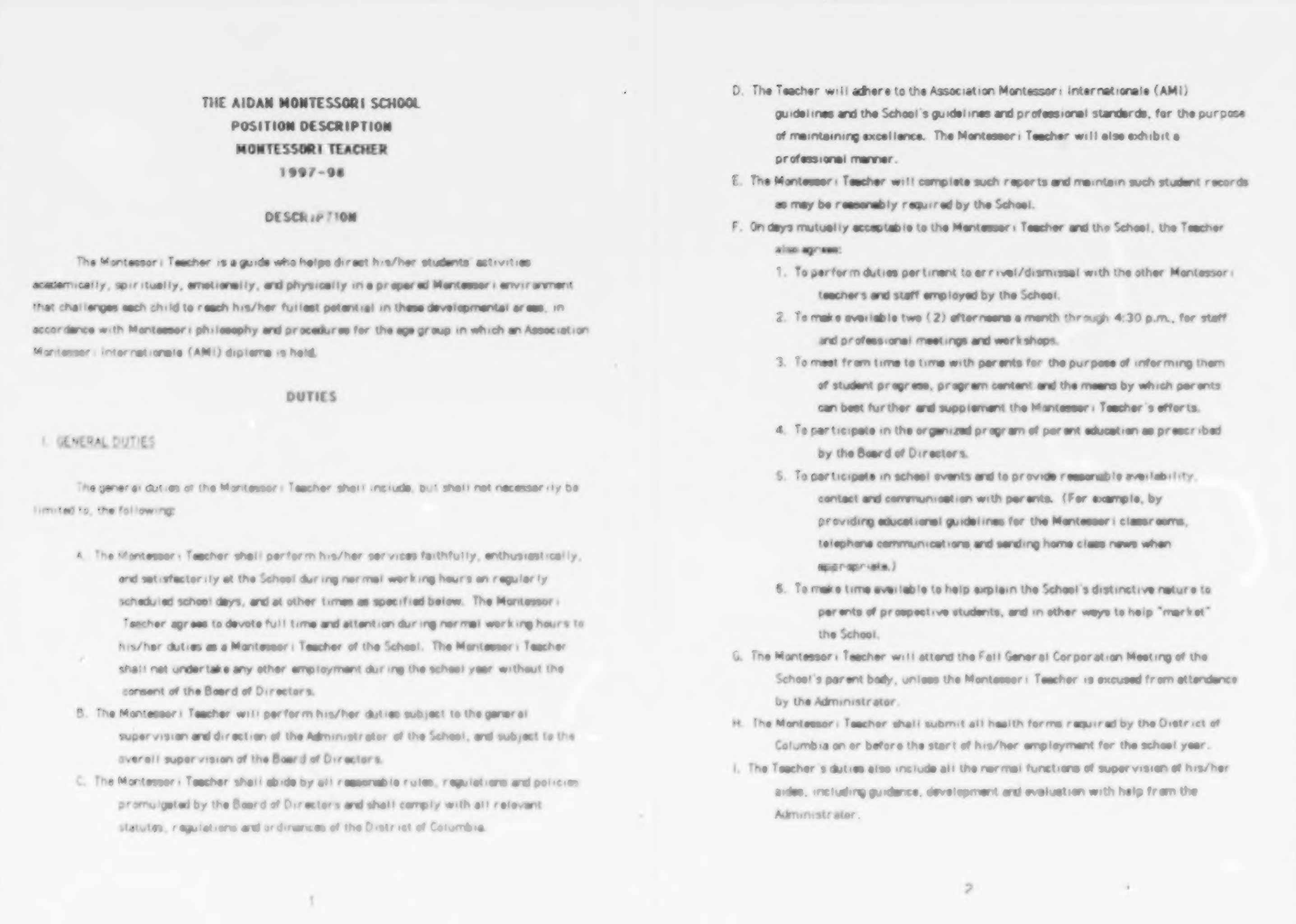


Job Description - **Teacher** (Cont.)

15. Attend and participate in school functions that relate to position or teaching level and attend Parent Association functions in support of the school community
16. Be available to assist with occasional support duties
17. Work with students of various abilities assigned to classroom, including those with learning differences as diagnosed. The teacher may be required to participate in meetings, training and planning cooperatives to fully serve each child's needs
18. Understand and promote the school's mission, purposes and objectives and policies to parents in a positive and supportive manner
19. Participate in class field trips (and overnights when appropriate to the level) and act in a supervisory capacity
20. Conduct oneself professionally by respecting student confidentiality, cooperating with staff members, working out differences in a mature and reasonable manner and communicating unresolved concerns with the Head of School
21. Meet with Head or Associate Head to solve problems as necessary as they may relate to relations with school, families, staff or staff member's performance
22. Fill-out and discuss teacher self-evaluations as prescribed for each level

Job Description: Teacher, Aidan Montessori School (Washington, DC)

This job description for a Montessori teacher includes some less tangible elements, such as attitude, devotion, and collaboration.



THE AIDAN MONTESSORI SCHOOL
POSITION DESCRIPTION
MONTESSORI TEACHER
1997-98

DESCRIPTION

The Montessori Teacher is a guide who helps direct his/her students' activities academically, spiritually, emotionally, and physically in a prepared Montessori environment that challenges each child to reach his/her fullest potential in these developmental areas, in accordance with Montessori philosophy and procedures for the age group in which an Association Montessori Internationale (AMI) diploma is held.

DUTIES

I. GENERAL DUTIES

The general duties of the Montessori Teacher shall include, but shall not necessarily be limited to, the following:

A. The Montessori Teacher shall perform his/her services faithfully, enthusiastically, and satisfactorily at the School during normal working hours on regularly scheduled school days, and at other times as specified below. The Montessori Teacher agrees to devote full time and attention during normal working hours to his/her duties as a Montessori Teacher of the School. The Montessori Teacher shall not undertake any other employment during the school year without the consent of the Board of Directors.

B. The Montessori Teacher will perform his/her duties subject to the general supervision and direction of the Administrator of the School, and subject to the overall supervision of the Board of Directors.

C. The Montessori Teacher shall abide by all reasonable rules, regulations and policies promulgated by the Board of Directors and shall comply with all relevant statutes, regulations and ordinances of the District of Columbia.

1

D. The Teacher will adhere to the Association Montessori Internationale (AMI) guidelines and the School's guidelines and professional standards, for the purpose of maintaining excellence. The Montessori Teacher will also exhibit a professional manner.

E. The Montessori Teacher will complete such reports and maintain such student records as may be reasonably required by the School.

F. On days mutually acceptable to the Montessori Teacher and the School, the Teacher also agrees:

1. To perform duties pertinent to arrival/dismissal with the other Montessori teachers and staff employed by the School.
2. To make available two (2) afternoons a month through 4:30 p.m., for staff and professional meetings and workshops.
3. To meet from time to time with parents for the purpose of informing them of student progress, program content and the means by which parents can best further and supplement the Montessori Teacher's efforts.
4. To participate in the organized program of parent education as prescribed by the Board of Directors.
5. To participate in school events and to provide reasonable availability, contact and communication with parents. (For example, by providing educational guidelines for the Montessori classrooms, telephone communications and sending home class news when appropriate.)
6. To make time available to help explain the School's distinctive nature to parents of prospective students, and in other ways to help "market" the School.

G. The Montessori Teacher will attend the Fall General Corporation Meeting of the School's parent body, unless the Montessori Teacher is excused from attendance by the Administrator.

H. The Montessori Teacher shall submit all health forms required by the District of Columbia on or before the start of his/her employment for the school year.

I. The Teacher's duties also include all the normal functions of supervision of his/her aides, including guidance, development and evaluation with help from the Administrator.

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Job Description: Teacher, Aidan Montessori School (continued)

II. SPECIFIC DUTIES RELATING TO TEACHING, EDUCATION, AND THE CLASSROOM

The specific duties of the Montessori Teacher shall include, but shall not necessarily be limited to, the following. The Montessori teacher will:

A. Demonstrate rapport with, and respect and kindness for, the students.

B. Prepare an environment in which the furnishings and materials are complete and correspond to the needs of the group.

C. Be responsible for the care and maintenance of classroom materials; i.e., maintain a safe and orderly environment. The children are to be brought into this responsibility.

D. Assist in interviewing and hiring an Assistant for his/her classroom.

E. Be available to the Assistant to provide opportunities to share questions and observations.

F. Supervise and evaluate the Assistant on a regular basis, both formally and informally.

G. Assist in planning and attending such events as Back to School Night, Parent-Child Night, Parent Education evenings, Auction, Art Fair, Science Fair, and School Picnic, etc.

H. Coordinate curriculum implementation with the Speciality Teachers.

I. Maintain an on-going dialogue between Speciality Teachers and Montessori Teachers.

J. Maintain an inventory of the classroom, with the help of the School Office.

K. Maintain current attendance records.

L. Maintaine and develop lesson plans for each student.

M. Attend staff meetings, Faculty Retreat, and any special meeting(s) as reasonably requested by the Administrator, and as mutually agreed upon.

N. Attend at least one pre-planned in-service training session yearly (approved by the Administrator).

O. Prepare written student evaluations of each child's academic development and social behavior at the end of the school year for Primary teachers, and in January and June for the Elementary teachers, and at other times as required by the Administrator.

P. Hold two formal conferences yearly with parents concerning the child's progress and specific needs, and communicate regularly with parents with regard to their child's specific needs.

Q. Maintain current and accurate academic records.

R. Submit academic records and other records during the year as requested by the Administrator.

S. Accept responsibility (along with the Assistant) for the safety and physical well-being of the children under his/her supervision. The children are never to be left alone.

T. Notify the Administrator immediately of personal difficulties with children, parents or staff.

U. Protect the privacy and confidentiality of each student of the class.

V. Establish a positive relationship with parents of the students.

W. Conduct class meetings for parents when appropriate, and communicate and cooperate with classroom representatives.

X. Communicate and cooperate with the Administrator on program changes in accordance with Montessori philosophy.

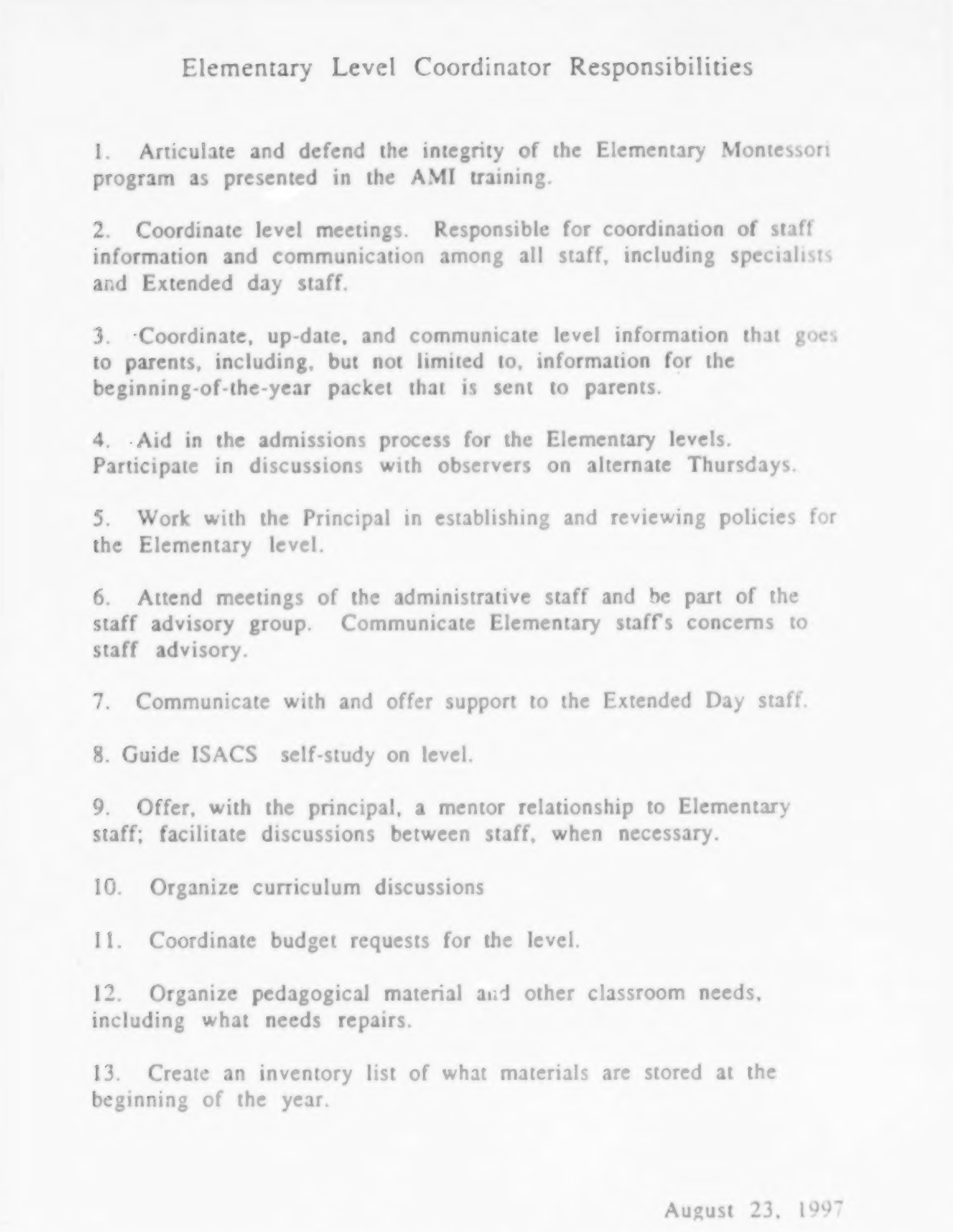
Y. Submit news for the "Newsletter", "Class Notes", and "School Notes" when appropriate.

Z. Train and supervise children in the execution of Fire Drills. The routine is to be clearly established and the building exited with dispatch and order.

AA. Report any and all accidents/incidents at once. File an "Incident Report Form" as appropriate.

BB. Assist with other projects, programs and planning as assigned by the Administrator and/or relating to the classroom and curriculum.

Job Description: Level Coordinator, Lake Country School (Minneapolis, MN)



Elementary Level Coordinator Responsibilities

1. Articulate and defend the integrity of the Elementary Montessori program as presented in the AMI training.

2. Coordinate level meetings. Responsible for coordination of staff information and communication among all staff, including specialists and Extended day staff.

3. Coordinate, up-date, and communicate level information that goes to parents, including, but not limited to, information for the beginning-of-the-year packet that is sent to parents.

4. Aid in the admissions process for the Elementary levels. Participate in discussions with observers on alternate Thursdays.

5. Work with the Principal in establishing and reviewing policies for the Elementary level.

6. Attend meetings of the administrative staff and be part of the staff advisory group. Communicate Elementary staff's concerns to staff advisory.

7. Communicate with and offer support to the Extended Day staff.

8. Guide ISACS self-study on level.

9. Offer, with the principal, a mentor relationship to Elementary staff; facilitate discussions between staff, when necessary.

10. Organize curriculum discussions

11. Coordinate budget requests for the level.

12. Organize pedagogical material and other classroom needs, including what needs repairs.

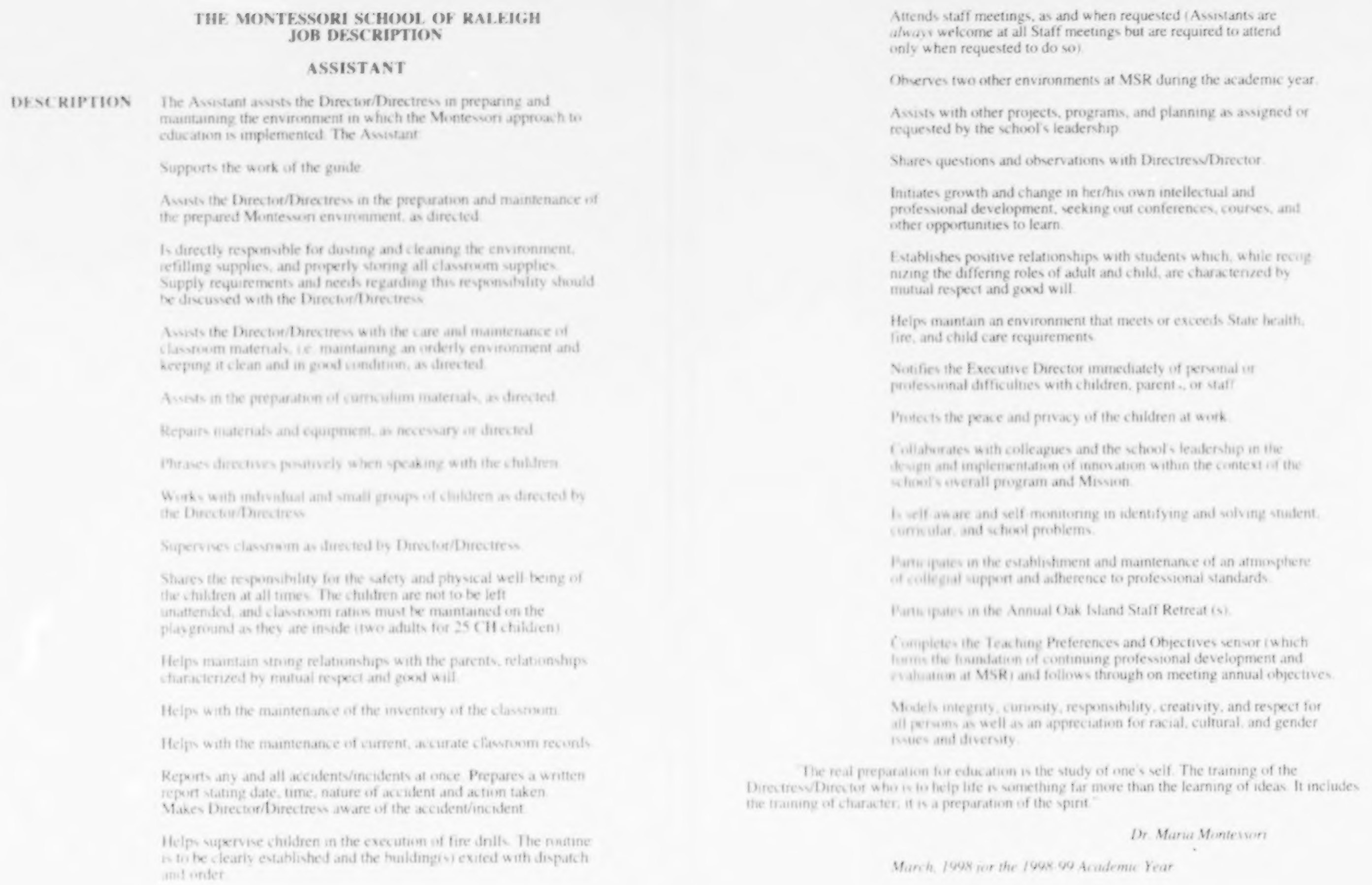
13. Create an inventory list of what materials are stored at the beginning of the year.

August 23, 1997

When a teacher assumes an additional role in the school, it is advisable to develop a separate description of those responsibilities.

Job Description: Assistant, Montessori School of Raleigh (Raleigh, NC)

The following four job descriptions were developed for a variety of support and administrative positions: classroom assistant, secretary/office manager, business manager, and director of admissions. See chapter 13 for a job description for director of development.



THE MONTESSORI SCHOOL OF RALEIGH
JOB DESCRIPTION

ASSISTANT

DESCRIPTION The Assistant assists the Director/Directress in preparing and maintaining the environment in which the Montessori approach to education is implemented. The Assistant:

Supports the work of the guide.

Assists the Director/Directress in the preparation and maintenance of the prepared Montessori environment, as directed.

Is directly responsible for dusting and cleaning the environment, refilling supplies, and properly storing all classroom supplies. Supply requirements and needs regarding this responsibility should be discussed with the Director/Directress.

Assists the Director/Directress with the care and maintenance of classroom materials, i.e. maintaining an orderly environment and keeping it clean and in good condition, as directed.

Assists in the preparation of curriculum materials, as directed.

Repairs materials and equipment, as necessary or directed.

Phrases directives positively when speaking with the children.

Works with individual and small groups of children as directed by the Director/Directress.

Supervises classroom as directed by Director/Directress.

Shares the responsibility for the safety and physical well-being of the children at all times. The children are not to be left unattended, and classroom ratios must be maintained on the playground as they are inside (two adults for 25 CH children).

Helps maintain strong relationships with the parents, relationships characterized by mutual respect and good will.

Helps with the maintenance of the inventory of the classroom.

Helps with the maintenance of current, accurate classroom records.

Reports any and all accidents/incidents at once. Prepares a written report stating date, time, nature of accident and action taken. Makes Director/Directress aware of the accident/incident.

Helps supervise children in the execution of fire drills. The routine is to be clearly established and the building(s) exited with dispatch and order.

Attends staff meetings, as and when requested (Assistants are *always* welcome at all Staff meetings but are required to attend only when requested to do so).

Observes two other environments at MSR during the academic year.

Assists with other projects, programs, and planning as assigned or requested by the school's leadership.

Shares questions and observations with Directress/Director.

Initiates growth and change in her/his own intellectual and professional development, seeking out conferences, courses, and other opportunities to learn.

Establishes positive relationships with students which, while recognizing the differing roles of adult and child, are characterized by mutual respect and good will.

Helps maintain an environment that meets or exceeds State health, fire, and child care requirements.

Notifies the Executive Director immediately of personal or professional difficulties with children, parents, or staff.

Protects the peace and privacy of the children at work.

Collaborates with colleagues and the school's leadership in the design and implementation of innovation within the context of the school's overall program and Mission.

Is self-aware and self-monitoring in identifying and solving student, curricular, and school problems.

Participates in the establishment and maintenance of an atmosphere of collegial support and adherence to professional standards.

Participates in the Annual Oak Island Staff Retreat (s).

Completes the Teaching Preferences and Objectives sensor (which forms the foundation of continuing professional development and evaluation at MSR) and follows through on meeting annual objectives.

Models integrity, curiosity, responsibility, creativity, and respect for all persons as well as an appreciation for racial, cultural, and gender issues and diversity.

"The real preparation for education is the study of one's self. The training of the Directress/Director who is to help life is something far more than the learning of ideas. It includes the training of character; it is a preparation of the spirit."

Dr. Maria Montessori

March, 1998 for the 1998-99 Academic Year

Job Description: Secretary/Office Manager, Franciscan Montessori Earth School (Portland, OR)

POSITION

Support Staff – Secretary/Office Manager
Franciscan Montessori Earth School

DESCRIPTION

The Secretary/Office Manager is to develop and maintain an office environment that serves as an information center for interested persons, parents and staff in a professional manner.

DUTIES

Prime responsibility is to generate that work required by the Administration and develop communication among office staff.

Responsible that school communication be cared for as required.

Answer telephone, record and distribute all messages. Keep staff cubbies current.

Initiate school interviews. Schedule interviews, observations and conferences as directed.

See that a parent is called if a child is sick or injured as required. Oversee care of the Health Bay area.

Maintain confidentiality of all school matters.

File and maintain all office related materials. Care of maintain the file room (vault room). Responsible for the filing, care and upkeep of the general files.

Courteous and pleasant to children, teachers, parents and colleagues.

Oversee the maintenance of all forms.

Attend general school functions as requested.

Arrange Administrator's appointments, monthly meetings for the office staff, school observations, tours, and Advisory Board meeting reminders.

Understand and abide by the policies of the Franciscan Montessori Earth School in a professional manner. Adhere to AMI, AMS and OMA guidelines and standards as an affiliate school, for the purpose of maintaining quality and excellence. Necessary instructions to be provided by the Administrator.

Interpret the education program, the philosophy, policy and procedures of the school and communicate same to parents, children, interested persons and colleagues in a professional manner.

Type, copy and distribute those materials (Earth Experience forms, permission slips, memos to parents, staff sign-in, sign-out sheets, permanent record booklets, new staff information, etc.) as required by the Guides and approved by the Associate Administrator.

(over)

Responsible for the time cards, payroll schedule, teacher conference schedules, M.A. snack schedules, and the vacation schedules of the office staff under the direction of the Associate Administrator.

Care and maintenance of the office plants and animals, front desk ordered.

Assist the Administrator as needed. Occasional typing for F.S.E. programs and meetings.

Care and maintenance of office machines, copy machine, typewriters and the postage meter.

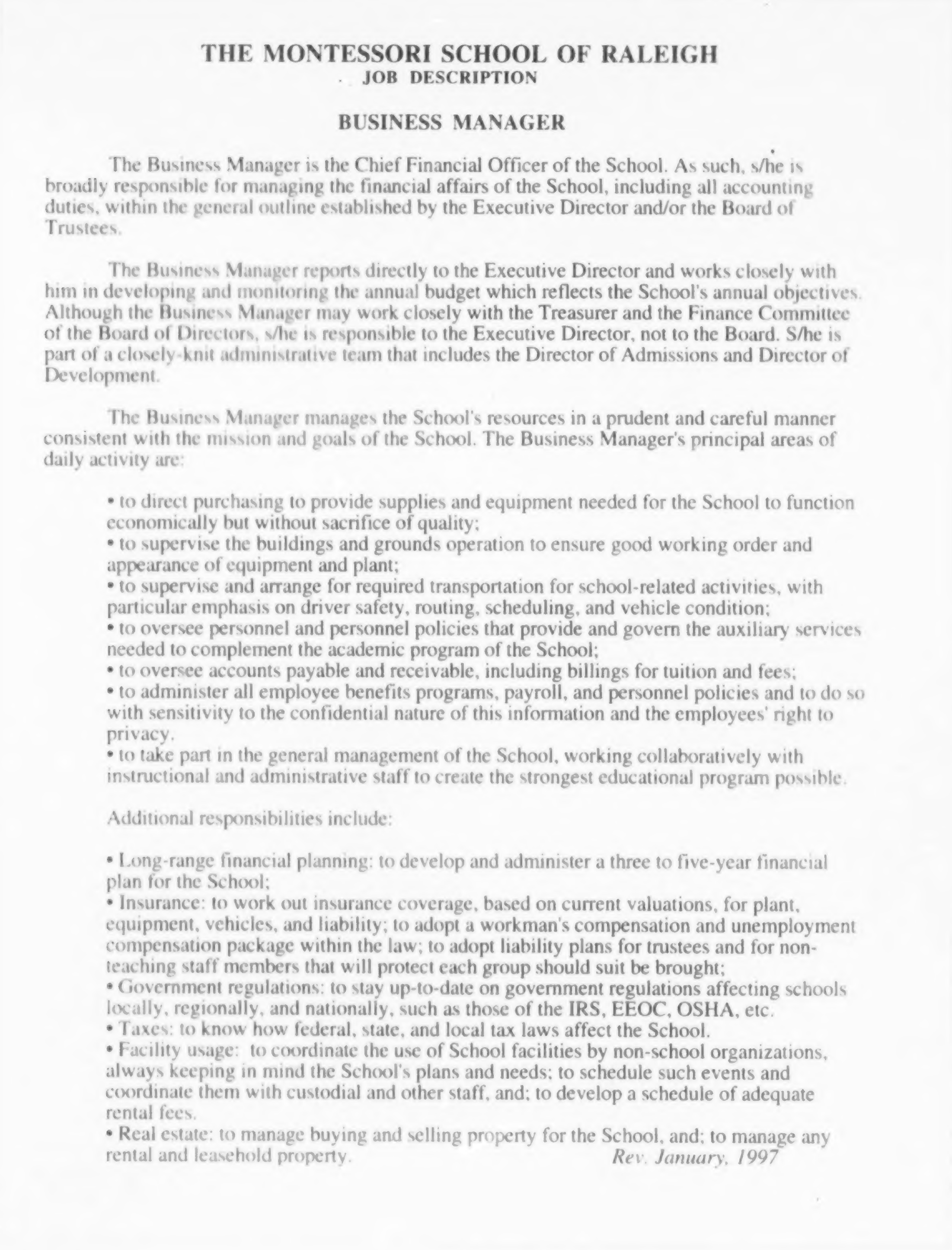
Care for and maintain the Copy Room. Order supplies for and maintenance of the copier machine.

QUALIFICATIONS

Good secretarial skills. Ability to interact with people in a professional manner.

2/94

Job Description: Business Manager, Montessori School of Raleigh (Raleigh, NC)



THE MONTESSORI SCHOOL OF RALEIGH

JOB DESCRIPTION

BUSINESS MANAGER

The Business Manager is the Chief Financial Officer of the School. As such, s/he is broadly responsible for managing the financial affairs of the School, including all accounting duties, within the general outline established by the Executive Director and/or the Board of Trustees.

The Business Manager reports directly to the Executive Director and works closely with him in developing and monitoring the annual budget which reflects the School's annual objectives. Although the Business Manager may work closely with the Treasurer and the Finance Committee of the Board of Directors, s/he is responsible to the Executive Director, not to the Board. S/he is part of a closely-knit administrative team that includes the Director of Admissions and Director of Development.

The Business Manager manages the School's resources in a prudent and careful manner consistent with the mission and goals of the School. The Business Manager's principal areas of daily activity are:

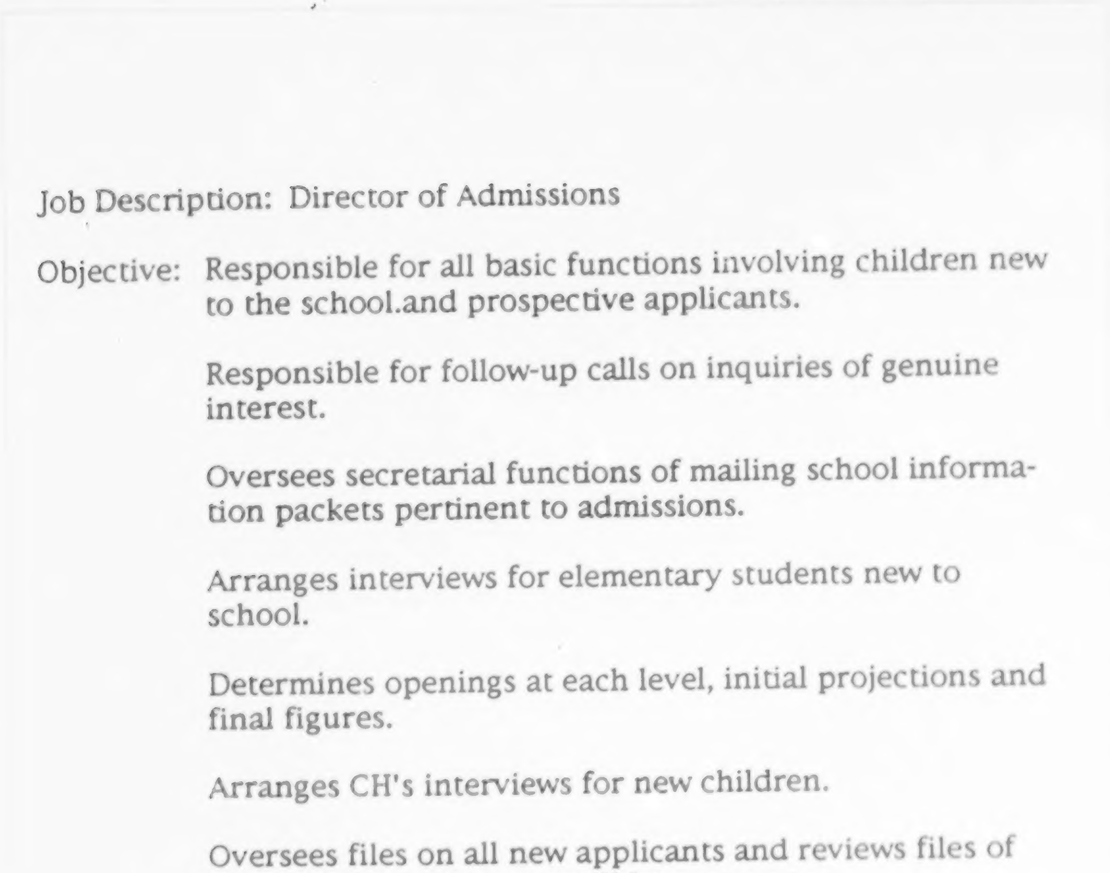
- to direct purchasing to provide supplies and equipment needed for the School to function economically but without sacrifice of quality;
- to supervise the buildings and grounds operation to ensure good working order and appearance of equipment and plant;
- to supervise and arrange for required transportation for school-related activities, with particular emphasis on driver safety, routing, scheduling, and vehicle condition;
- to oversee personnel and personnel policies that provide and govern the auxiliary services needed to complement the academic program of the School;
- to oversee accounts payable and receivable, including billings for tuition and fees;
- to administer all employee benefits programs, payroll, and personnel policies and to do so with sensitivity to the confidential nature of this information and the employees' right to privacy.
- to take part in the general management of the School, working collaboratively with instructional and administrative staff to create the strongest educational program possible.

Additional responsibilities include:

- Long-range financial planning: to develop and administer a three to five-year financial plan for the School;
- Insurance: to work out insurance coverage, based on current valuations, for plant, equipment, vehicles, and liability; to adopt a workman's compensation and unemployment compensation package within the law; to adopt liability plans for trustees and for non-teaching staff members that will protect each group should suit be brought;
- Government regulations: to stay up-to-date on government regulations affecting schools locally, regionally, and nationally, such as those of the IRS, EEOC, OSHA, etc.
- Taxes: to know how federal, state, and local tax laws affect the School.
- Facility usage: to coordinate the use of School facilities by non-school organizations, always keeping in mind the School's plans and needs; to schedule such events and coordinate them with custodial and other staff, and; to develop a schedule of adequate rental fees.
- Real estate: to manage buying and selling property for the School, and; to manage any rental and leasehold property.

Rev. January, 1997

Job Description: Director of Admissions, Lake Country School (Minneapolis, MN)



Job Description: Director of Admissions

Objective: Responsible for all basic functions involving children new to the school.and prospective applicants.

Responsible for follow-up calls on inquiries of genuine interest.

Oversees secretarial functions of mailing school information packets pertinent to admissions.

Arranges interviews for elementary students new to school.

Determines openings at each level, initial projections and final figures.

Arranges CH's interviews for new children.

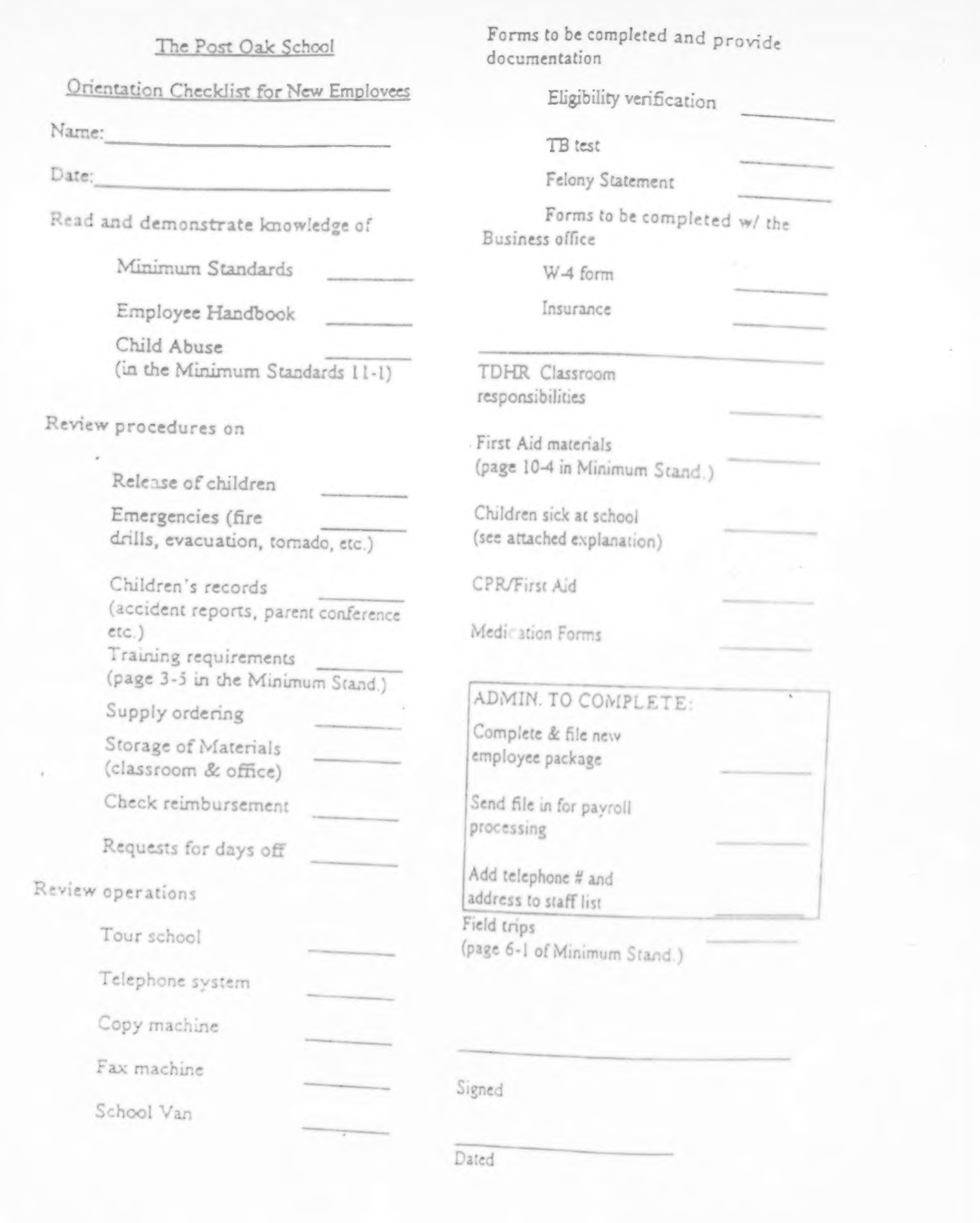
Oversees files on all new applicants and reviews files of old applicants who may still be prospects.

Keeps tally on enrollment all year long.

Plans for Thursday Observations sessions, scheduling and conducting tours and answering questions regarding admissions.

Works as liason to parent volunteers and in support of the Parent Involvement Committee.

Orientation Checklist, The Post Oak School (Bellaire, TX)



The Post Oak School

Orientation Checklist for New Employees

Name: ____

Date: ____

Read and demonstrate knowledge of

- Minimum Standards ____
- Employee Handbook ____
- Child Abuse ____
  (in the Minimum Standards 11-1)

Review procedures on

- Release of children ____
- Emergencies (fire ____
  drills, evacuation, tornado, etc.)
- Children's records ____
  (accident reports, parent conference etc.)
- Training requirements ____
  (page 3-5 in the Minimum Stand.)
- Supply ordering ____
- Storage of Materials ____
  (classroom & office)
- Check reimbursement ____
- Requests for days off ____

Review operations

- Tour school ____
- Telephone system ____
- Copy machine ____
- Fax machine ____
- School Van ____

Forms to be completed and provide documentation

- Eligibility verification ____
- TB test ____
- Felony Statement ____

Forms to be completed w/ the Business office

- W-4 form ____
- Insurance ____

____

TDHR Classroom responsibilities ____

First Aid materials ____
(page 10-4 in Minimum Stand.)

Children sick at school ____
(see attached explanation)

CPR/First Aid ____

Medication Forms ____

ADMIN. TO COMPLETE:

- Complete & file new employee package ____
- Send file in for payroll processing ____
- Add telephone # and address to staff list ____

Field trips ____
(page 6-1 of Minimum Stand.)

____
Signed

____
Dated

This checklist ensures that new employees are eligible to work and have been familiarized with operational policies and procedures.

Operational Policies and Procedures

Introduction

Operational policies provide clear guidelines and limits, which promote responsibility within the staff community. Policies and procedures evolve as the school grows and changes. The head of school should seek input from the staff when developing or revising policies and procedures. Some policy changes, such as benefits or professional leave, may require endorsement by the board of trustees.

Operational policies and procedures are put in writing and usually collected into a staff handbook or operations manual. Policies cover a wide range of practices, behaviors, rights, and obligations. Some policies address liability issues of which faculty and staff must be made aware. There are also health and safety rules, which may also be included in the parent handbook but must be covered in even more detail for staff and faculty. Some policies relate to professional behavior, such as dress, smoking, communication, and confidentiality. For teachers, there may be specific policies related to curriculum planning, discipline, or parent conferencing. Usually most detailed are the employee policies that describe specifics of benefit packages and options, absence policies and procedures, professional development, etc. These detailed policies are often cross-referenced in the employment contract.

See Chapter 9 for information on employment contracts

There is no definitive set of operational policies for Montessori schools. Policies evolve out of the life of the school. Policies pertaining to operating the school are usually put forward by the head of school and approved by the board. Policies pertaining to the board and its management are formulated and approved by the board. Policy documents are living documents insofar as they emerge from the decisions made by the administration and the board based on the unique operating conditions of the school. The purpose of policies is to facilitate the functioning of staff within the school, encouraging independence and au-

TYPICAL CONTENTS OF AN EMPLOYEE HANDBOOK

General Information (often not included):

- school mission or philosophy statement
- school history
- chain of command/organizational chart
- job descriptions: brief or full
- admissions policy
- child screenings/testing policy
- student attendance policy
- any applicable laws/licensing requirements
- staff roster
- staff calendar
- board roster
- list of board committees & responsibilities

Legal Protection:

- confidentiality of student records/information
- sexual harassment policy
- child abuse policy
- HIV/AIDS policies/procedures
- materials ownership policy

Health & Safety:

- accident/illness procedures/forms
- safety procedures:
  - fire
  - eye protection
  - release of children
  - disaster plan
  - child missing from class
  - building security
  - bodily fluids handling procedures
- field trips: procedures/rules/laws
- playground safety/supervision rules
- handling & dispensing of medication

Academic Practices:

- environment guidelines/standards
- student referral procedures
- end-of-year procedure/checklist

Parent and Student Relations:

- discipline policy/student conduct guidelines
- guidelines for parent communication/conferences
- guidelines for conflict resolution
- homework policy
- record keeping/student evaluation

Hiring and Employment Policies:

- equal employment opportunity
- employment requirements:
  - citizenship/visa
  - criminal record check
  - TB screening &/or physical exam
  - orientation
- hiring procedure
- orientation checklist
- pay scale
- pay period
- pay deductions
- outside employment policy
- contract renewal/negotiation
- staff attendance and participation
- overtime policy
- code of ethics
- personnel records
- leave and time off:
  - vacation
  - holidays
  - sick days
  - professional leave
  - family leave
  - leave of absence
- benefits:
  - health/dental/vision
  - death and disability insurance
  - tax-deferred annuity or retirement plan
  - tuition waiver
  - professional development
- sabbatical policy
- faculty evaluation procedure
- teacher grievance procedures
- termination policy:
  - resignation
  - layoff
  - discharge
- employee responsibilities or standards:
  - performance
  - conduct
  - attendance
- faculty children: special policies
- smoking policy
- drug/alcohol policy
- personal phone calls

Administrative Matters:

- work or supply orders, reimbursements
- snow day procedures/notification
- faculty dress code
- parking procedures/policies

tonomy while ensuring that community agreements are upheld in order to serve the goals of the school.

The following discussion of operational policies and procedures is intended only to demonstrate the variety of policies that may be considered in building a staff community. These excerpts do not address specific policies related to state and local regulations because of their wide variation.

Legal Protection Policies

Confidentiality

Confidentiality is connected to integrity. Although faculty must at times allude to other children in discussing classroom social matters with parents, they should never make any negative comments about another child. In addition, it is important that children's records be released only to those who are legally entitled to see them. An attorney should be consulted for compliance with local regulations. Webster Montessori School (Webster, NY) specifies the following:

See Chapter 8 for information on student records from the parent's point of view

> No information about students will be given to any person unless a written request from a parent, a guardian, or an authorized agency has been received. No agency is authorized without signed parental consent or a signed court order.
>
> Parents shall be allowed access to their own children's academic files in accordance with New York State Education Law (within 45 days).

Lake Country School (Minneapolis, MN) makes the following confidentiality statement:

> LCS and its students' parents expect the highest level of discretion by staff, parents and children in regard to confidential information, files or personal data on the children. Conversations and behavior must reflect this level of discretion.
>
> In addition, as a result of your employment at LCS, you may acquire and have access to confidential information belonging to LCS of a special and unique nature and value, relating to such matters as LCS's financial information, data, records, reports, donor lists and legal matters.
>
> As a condition of employment, LCS asks that you agree that all such information is the exclusive property of LCS and that you will not at any time divulge or disclose to anyone, except in the responsible exercise of your job, any such information whether or not it has been designated specifically as "confidential."

Sexual Harassment

This policy, from Lake Country School (Minneapolis, MN) is particularly thorough and includes definitions derived from recent court decisions:

> It is the policy of LCS that all employees are entitled to a harassment-free work environment and will have management support in reporting any type of harassment

or related inappropriate behavior they might encounter. This policy applies to employees, students, vendors, volunteers or guests at the school location or wherever LCS students are present in accordance with the official school schedule.

Harassment

Harassment is verbal or physical conduct that has the intent or effect of unreasonably interfering with an individual's or group's work performance, or that creates an intimidating, hostile, or offensive work environment. The basis for harassment includes, but is not limited to age, color, disability, national origin, race, religion, sex or sexual orientation.

Sexual Harassment

Sexual harassment includes any unwanted or unwelcome attention or action of a sexual nature when submission to such conduct is made a term or condition of employment; or submission to or rejection of such conduct by the recipient is used as the basis of employment decisions affecting the recipient; or the conduct unreasonably interferes with an employee's job performance; or the conduct creates an intimidating, hostile or offensive work environment.

Sexual harassment is prohibited whether it is committed by supervisors/administrators, co-workers or non-employees. Sexually harassing conduct might include, among other things, use of sexual comments or jokes; sexual remarks about a person's body, clothing or sexual activities; patting, pinching or other offensive touching; displays of sexually suggestive pictures or objects; or unwelcome sexual advances or passes. The intent of the harasser is not the determining factor; what counts is the perception of the recipient of the behavior. Employees who have any questions about what constitutes sexual harassment should go to their Administrator for clarification.

Inappropriate Behavior

Additionally, even though a person's behavior might not be covered by the above definitions, it nevertheless might not be professional or consistent with a good working environment. An employee whose conduct is inappropriate will receive an explanation of the inappropriateness of the behavior. If the inappropriate behavior continues, or if a specific incident is severe, disciplinary action will be taken.

Reporting Harassment

LCS's Harassment Policy assures employees of LCS support in reporting any type of harassment or related inappropriate behavior. Employees experiencing or witnessing any type of harassment or inappropriate behavior should use the following procedure:

1. Deal with it immediately, advising the person that the behavior is inappropriate and must stop.

2. If an employee prefers not to discuss the matter with the offender, or the offender fails to respect a request, report the incident to the Principal. Reporting to a co-worker is not sufficient.

Employees who have information about violations of this Harassment Policy but do not provide this information to LCS or do not cooperate in any investigation are subject to disciplinary action.

> LCS will promptly investigate all reported incidents and take any appropriate corrective or disciplinary action, up to and including termination. Information will be revealed only on a need-to-know basis. LCS will not condone retaliation against any employee who reports possible harassment or inappropriate behavior or who assists with an investigation.

In light of a 1999 U.S. Supreme Court decision holding a school responsible for failure to stop sexual harassment of one student by another, schools may need to include student-to-student harassment in their policies.

Child Abuse

Reporting child abuse is a twofold legal problem. Not reporting child abuse objectively and immediately, with documented details, could be considered negligent. On the other hand, falsely reporting abuse with malicious intent may be construed as slander. A written record of physical injuries, suspected sexual contact, or signs of neglect will usually prevent any allegations of misreporting.

The head of school, not the teacher, should file the report with the appropriate agency, based on local regulations. The report should include dates and times, description of the injury in detail, drastic changes in health and behavior, direct quotations from the child indicating abuse, name and address of individual suspected, name and duties of individual making the report.

Old Brooklyn Montessori School (Cleveland, OH) gives a succinct statement of how to recognize and report child abuse, referring to relevant sections of the Ohio Revised Code:

> **Reporting Requirement.** Employees of OBMS who are acting in their official or professional capacity, and become aware, or suspect, that a student has suffered, or faces a threat of suffering, any physical or mental wound, injury, disability, or condition of a nature that reasonably indicates abuse or neglect of the child, shall immediately notify the Cuyahoga County Department of Human Services ((216) 696-KIDS) or the Cleveland Police Department. (O.R.C. §2151.421)
>
> **Training for Employees.** Within three (3) years of the commencement of his or her employment, OBMS shall provide employees with at least four (4) hours of in-service training in child abuse prevention and intervention. (O.R.C. §3319.073)

HIV Policies

Schools may not discriminate against HIV-positive students or employees, as demonstrated in this policy from Lake Country School (Minneapolis, MN):

> LCS will not refuse to hire or take adverse employment action against an employee who is HIV positive or has Acquired Immune Deficiency Syndrome (AIDS).
>
> The obligation of proactive education around the spread of AIDS is a LCS commitment.

The Minneapolis Public School's procedures for AIDS are implemented by Lake Country School as a guideline. These guidelines are available in the School Office for review.

Most students will be allowed to attend school since the risk of transmission of AIDS in a school setting is negligible. School attendance by students who lack control of their body secretions or who display behavior such as biting or who have medical conditions such as oozing lesions will be reviewed on an individual basis.

Persons involved in the education of students with AIDS will respect the student's right to privacy.

Educational decisions regarding a student with AIDS, his/her school placement and program, will be made on an individual case-by-case basis. These decisions will be based on current medical information regarding AIDS as a communicable disease and the medical condition of the student.

The school nurse will monitor the student's medical status through regular contacts with the student's parent/guardian and physician. The nurse will, in addition, coordinate AIDS staff development programs and take a leadership role in parent education, including dissemination of educational materials and the school district's procedures for a student with AIDS. The School Nurse will also distribute any changes in the Public School's procedures as they occur.

Ownership of Materials

Because Montessori teachers make many of their classroom materials by hand, it is important to have a clear policy on the legal ownership of teacher-made materials. The following policy, from the Montessori School of Northern Virginia (Annandale, VA) is a good example:

Policy for Ownership and Reimbursement for Teacher-Made Materials:

School-owned materials: all materials donated by parents, assistants, libraries, other schools, etc., are the property of MSNV. Any materials donated to the teacher as a gift for her classroom are to remain the property of MSNV.

Teacher-directed materials: these are materials that have been researched and directed by the teacher but typed, cut, traced or otherwise assembled by parents or classroom assistants. The raw supplies for these materials have been provided by the school. These materials are thus considered the property of MSNV. When leaving the school, the teacher should have the benefit of her special research and the time invested in these directed materials. Therefore, the teacher may, within the first two months of contract termination, duplicate these research materials, or, if it is unable to be duplicated, the material may be purchased by the teacher from MSNV at a mutually agreed-upon price. Also, papers and projects developed for MSNV-sponsored presentations become part of the school's resource file.

Teacher-owned materials: These are materials for which the teacher has provided the raw materials, and assembled them without the use of any parent or assistant labor. Whenever possible, teachers should purchase their own supplies if their intent is to keep these materials. When such materials are used in the classroom, laminating

> costs are not charged. Teacher-owned materials are to be labeled with the teacher's name or included on the teacher's personal inventory. When the staff member leaves MSNV the school may opt to purchase these materials from the teacher at a mutually agreed-upon price.

This policy is from the Franciscan Montessori Earth School (Portland, OR):

> **Copyrights and Patents:**
>
> Sole ownership of any materials, processes, or inventions developed solely by a staff member's individual effort, time and expense shall vest in the staff member and be copyrighted or patented, if at all, in his/her name.
>
> The ownership of materials, processes or inventions produced solely for the school and at the school's expense shall vest in the school and be copyrighted or patented, if at all, in its name.
>
> In those instances where those materials, processes or inventions are produced by a staff member with school support, facilities, or other school resources, the ownership of the materials, processes or inventions shall vest in the school.

Health and Safety Policies and Procedures

The health and safety of faculty, staff, and students should, of course, be a top priority of any school. Unfortunately, in today's litigious society, health and safety matters are often the basis for legal actions; therefore, policies must be crafted and documented carefully in order to minimize liability.

Liability can arise from any proven negligence that leads to injury (e.g., use of defective furniture, failure to require use of safety wear such as goggles, etc.). Playing areas should be reviewed annually for safety, and only appropriate play should be permitted. Jumping from the top of a slide, for instance, is not appropriate use of the slide and may be construed as school negligence. In addition, the teacher is considered legally responsible for children who are excluded from the classroom and are subsequently injured due to lack of supervision.

Accidents, Illness, and Emergencies

All staff must be prepared to respond appropriately to an accident or sudden illness. Many schools require all or most staff to have first aid training; some insurance policies specify that an adult trained in first aid must be on the premises at all times that children are present. Most school accident policies stress that an injured child is never to be left alone; one adult stays with the child while another seeks help. It is also important to have procedures in place for immediately notifying parents and seeking appropriate medical help.

See Chapter 7 for information on emergency contact forms, medical authorizations, etc.

The school must keep accurate records of accidents and their aftermath in case there is an insurance claim or litigation. Most schools provide accident reporting forms to elicit such information as the following: date and time of accident; names of any witnesses; where accident occurred; apparatus in use at time of accident; supervision at time of accident; detail of how accident occurred; details of injuries; any first aid performed; persons contacted: family, family physician, ambulance, etc.; and whether child was taken home or to the hospital.

In addition, schools must have specific plans and procedures for emergencies such as fire or other natural disaster. State and local laws as well as insurance regulations may specify procedures for fire and tornado drills, disaster planning, proper handling of hazardous materials (in a chemistry lab, for instance), etc. Finally, all staff must be made aware of building security policies and procedures.

Handling Bodily Fluids

Rules of hygiene should include "glove on" procedures, such as these from The Post Oak School (Bellaire, TX):

> AIDS virus (HIV) is by no means the most worrisome or common virus. There are no cases of HIV infection from a child care setting. However, several serious viral illnesses are developing and becoming more common.
>
> Hepatitis is a much greater problem than HIV. Hepatitis A or viral hepatitis is transmitted to others by fecal contamination of food. Thorough hand washing after using the toilet is always recommended for adults and children.
>
> Hepatitis B or serum hepatitis is present in the blood of infected persons. It is highly infectious. People can carry this in their blood streams, and infect others, for quite a time prior to showing any symptoms; contagion continues after symptoms appear. Only one case of a child care worker becoming infected with Hepatitis B is documented. Vaccinations are available for Hepatitis A and B.
>
> Prevention: Protect oneself from these viruses. The major transmission is by sexual contact or eating contaminated food. The next most common route of infection is through open wounds or eyes. Put on disposable latex gloves before handling any bodily fluids (blood, urine, vomit, feces, phlegm, etc.). Dispose of gloves properly after use. Use bleach to clean any contaminated surface. Wash your hands after wearing the latex gloves.

Field Trip Safety

For every stage of development, there are corresponding field trip regulations. These are from Lake Country School (Minneapolis, MN):

> **CH Policies on "Going Out"**
>
> The Children's House is a protected environment. It is not our philosophy that Children's House children are well served by "going out." However, on those rare occasions when a field trip is appropriate, the following guidelines apply:
>
> *A. Whole Group:*
>
> Adult-child ratio of 1:6 (this means 5 adults with 28 children).

No CH child will be in a public restroom without an adult supervising.

Parents will be notified at least 2 days in advance of the field trip.

B. Afternooners:

Adult-child ratio of 1:7.

No CH child will be in a public restroom without an adult supervising.

Parents will be notified at least 2 days in advance of the field trip.

C. Park Playground Rules:

Given the security guidelines with which we have been presented, we have lost the flexibility that allows us spontaneously to take advantage of good weather conditions.

In Minnesota it is impossible to rely on planning outings to parks; the weather is too unpredictable.

Upon consultation with the Minneapolis Police Department, we have deemed Martin Luther King Park and Lyndale Farmstead safe to go to with CH staffing as described above.

D. General Guidelines:

At no time will there be fewer than 2 adults accompanying a group of children leaving LCS (see whole group ratio and afternoon ratio above).

Staff will take the School's cellular phone to use on outings in case of emergency.

Staff will take 2 first aid kits in a portable, carrying case (e.g. fanny pack) with Band-Aids, gauze and cold compresses.

Elementary I Policies for "Going Out" (Ages 6, 7, and 8)

1. Parents will be informed by the teacher IN ADVANCE OF ALL CLASS TRIPS. Spontaneous trips for small groups are possible.

2. Ratio of adult-child is 1:10. This is the maximum number of children to adults.

3. A buddy system will be used. Each child will be paired with a partner or partners and coached on being responsible to and for others.

4. Use of public bathrooms: A buddy system must be used. No child should be alone in a public bathroom. All children should be with their buddy or in a small group.

5. Use of public transportation: EI will use public transportation when appropriate and possible. The school believes it provides a significant educational experience and is part of the natural exploration of children. We will avoid rush hour times and crowded buses.

6. The EI staff would like to take children out in small groups and needs chaperones to do this. A school-wide list of parents willing to take children out on trips will be developed and made available to staff.

7. EI will take the School's cellular phone and a first aid kit on all outings.

Rules of the Buddy System

1. Always know where your buddy is. Stay close to your buddy.

2. Always tell your buddy where you're going.

3. Remind your buddy of the trip's schedule—what time you're due back, when the group needs to regroup, etc.

4. Be guided by the principles of cooperation and co-responsibility.

5. Don't be afraid to tell your buddy when he/she is not acting properly.

Elementary II Policies on "Going Out" (Ages 9, 10, and 11)

1. Parents will be informed in writing by the child and/or the teacher in advance of trip.

2. Adult-child ratio: No more than 1:15.

3. A buddy system will be used. Each child will be paired with a partner or partners (no more than 2 others) and coached on being responsible to and for others.

4. A buddy system will be used also for bathrooms. No child should be alone in a public bathroom. All children should be with their buddy or in a small group.

5. Public transportation has central and significant value for EII children and will be used whenever possible. The diversity of our city and population can be experienced this way. It provides us with flexibility in transportation when vans or parents are not available and is a learning experience for older elementary children.

6. Our preferred outings are arranged by the children with parents providing transportation for small groups.

7. EII will take the School's cellular phone to use on outings in case of emergency when a phone is not readily available at the destination. A first aid kit will also be taken when appropriate.

8. Teachers should communicate to the children the responsibility for being positive ambassadors for Lake Country School.

Junior High Policies on "Going Out"

1. Parents will be informed in writing by the teachers in advance of trip.

2. Adult-student ratio: No more than 1:16.

3. A buddy system will be used. Each student will be paired with a partner or partners (no more than 2 others) and coached on being responsible to and for others.

4. Buddy system will be used also for bathrooms. No student will be alone in a public bathroom. All students will be with a partner or small group.

5. Junior High students will be allowed to leave the School with a partner for the Saigon Restaurant and the Grand Bakery. Junior High students will not leave for the corner of 38th and Nicollet without adult supervision.

6. On walks to Martin Luther King Park or Lyndale Farmsteads, the students will be accompanied by 2 adults. The cellular phone and first aid kit will be taken.

7. The School's cellular phone will be taken on all field trips.

Playground Safety

Playground policies can be written from the adult's or the child's point of view. The first is presented here, from Metropolitan Montessori School (New York, NY):

> Playground rules are distributed during the pre-school orientation meetings and should be posted in all classrooms. These rules must be reviewed yearly with the children, stressing posted safety, and must be enforced rigorously by the supervising teachers. The Head of School will schedule coverage assignments for lunchtime recess breaks; head teachers will supervise their classes at all other times on the playground except for Physical Education. Some points to keep in mind while supervising children during playground time:
>
> - always escort children to the playground;
> - check the playground for unsafe material and remove it;
> - maintain awareness of all the children and all the activity by walking about and watching the children and all areas of the playground;
> - all teachers should feel comfortable approaching children of any class about behavior when carrying out playground supervision;
> - during an emergency, one teacher stays with the group while the other teacher handles the situation;
> - older classes need extra vigilance due to their size, speed, enthusiasm and competitiveness;
> - limit conversations with other adults so as not to be distracted.

These playground safety rules, from Lake Country School (Minneapolis, MN) emphasize the child's point of view:

> **Respect for Others:**
>
> Play safely. Avoid pushing, tackling games, wrestling, kicking, fighting, blocking others' activities, and throwing snow, ice, sand, wood chips, stones, equipment, etc.
>
> Be aware. Don't interrupt others' games; look before you leap; watch out for children who are smaller or younger than you are; watch where you are going; wait for others to finish their turn at something before you take yours.
>
> Include other people in your games and other people's ideas during a game.
>
> Follow the rules. If you have a problem or a complaint that you cannot resolve for yourself or with the help of an arbiter, seek out an adult on duty for guidance. Listen to and follow the adult's recommendations.
>
> **Respect for Materials, Tools and Equipment:**
>
> Use all playground materials, tools and equipment for what they are intended.
>
> Slides—Do not climb up the inside or outside of any slide; one person at a time on the slide; no head-first sliding; make sure the path is clear before you slide; when you have finished your slide, clear away from the base of the slide quickly so that others may have their turn.

Ladders—Avoid pushing and crowding on the ladders; allow others to climb at their own pace.

Rings—Use them with hands only. No walking from ring to ring or climbing on the bars above them.

Respect for the environment:

Fence—Stay within the fenced play area at all times unless you have specific instructions from the adult on duty to leave; avoid bouncing off of and climbing on the fence.

Bushes, trees, plants, grass—Unless you are gardening, avoid digging in, pulling on, picking at, breaking off, or hanging from the vegetation. Use designated walkways whenever possible.

Other surfaces—Avoid digging in the wood chips, in the asphalt, in the cement and on the building.

Indoors—Have indoor and outdoor shoes during wet or snowy weather to protect our indoor environment from mud, snow, ice, sand and scratches.

Respect for Self:

Wear weather-appropriate clothing at all times, play fairly, play safely, talk to your teacher or student council representative about continuing problems that you see, things that need to be changed or ideas you have about the playground. Make play time fun.

Medication

See Chapter 7 for examples of appropriate forms for use in administering medications.

Strict guidelines must govern the handling and administering of medications to avoid possible injury and liability. These policies are from The Post Oak School (Bellaire, TX):

Medications are stored and dispensed only through the front office. Parents may obtain the Medication Dispensing Permission Form at the front desk. Parents will turn in the completed form with the child's medicine.

Medicine should never be sent with the child. Occasionally, children may come to school with medication in their lunch box or school bag. Please notify the front office immediately if this happens so that we can contact the parent and correct the situation. Do not apply any medication to a wound other than water and/or a Band-Aid.

All medications will be kept under lock and key at the front office, and will be administered by administrative staff. Files regarding medications will be retained. These should include: emergency telephone numbers, names, and data on prescriptions—pharmacy, names, and dosage. Most children are sent to the front office to receive their medications. If a child is late for a scheduled medicine, the office will buzz the classroom as a reminder. Some primary and infant level children receive their medications in the classroom which are brought to them by administrative staff.

Academic Practices

Academic practices covered in policy handbooks sometimes include such matters as standards for the prepared environment, curriculum guidelines, referral procedures, the school's approach to screening and testing, homework policy, record keeping and student evaluation, and end-of-year procedures.

Standards for the Prepared Environment

The principle of standardized prepared environments (minimum standards) helps the head of school convey the expected level of material preparation and what material orders should include. It helps address the disparity of classroom quality that could easily be perceived if some classes are under- or over-equipped.

See Appendices 1-3 for a complete list of appropriate materials for the infant through upper elementary levels

Referral Procedures

Referral procedures for tutoring, counseling, and other ancillary services should be made very clear since they often involve extra fees and could involve liability. All referrals are carried out by the head of school. See Conflict of Interest, below, for information about tutoring provided by school faculty.

The following referral guidelines are from Lake Country School (Minneapolis, MN):

> **Guidance**
>
> A Minneapolis Public School social worker is assigned to Lake Country School. Teachers and parents should inform the Principal of any need for this service.
>
> Junior High advisory groups are led by Junior High staff weekly for informal communication and counseling. A Junior High staff member is also available for informal counseling.
>
> Teachers who feel students need special testing or guidance should confer with the Principal for recommendations. A list of testing services, tutors, and child psychologists is available for making recommendations to parents. It is also possible to receive support for the teacher from an outside specialist regarding challenges with students.
>
> **Tutorial Services**
>
> The school hires an in-house tutor professionally trained to meet the special needs of students who may have developmental delays, learning disabilities or special needs. Parents pay for this service and are billed through the office.
>
> The procedure for a child to receive tutoring is as follows:
>
> 1. The tutor is contacted by either the teacher or the parent/s in response to concerns about the student. (The earlier in the child's schooling this is done, the better.)
>
> 2. After obtaining written permission from the parent/s to test the student, the tutor proceeds with testing.

> 3. Test results are shared in a meeting of the tutor, parent/s and teacher. A plan is presented by the tutor and a course of action is agreed upon.
>
> 4. A formal contract is sent to the parent/s to sign and return to the school.
>
> 5. Tutoring begins once the signed contract is received by the school.
>
> Tutoring is usually done outside the classroom. The tutor should attend the parent conferences of tutorial children and set up meetings for communication whenever necessary.
>
> Teachers can expect the tutor to provide a written report at the end of the year on a child's progress, with a recommendation for continuing or ceasing tutoring. All children who have been released from the program should be carefully monitored, and the tutor should inform teachers new to the child of difficulties the child may experience.
>
> The school also has a reading specialist who works with beginning readers in Elementary I who need special help and with Elementary II children who may still be experiencing difficulty. These children may also be referred for tutorial help.

End-of-Year Procedures

Closing procedures should be explicit so that teachers know exactly when their job is complete. Old Brooklyn Montessori School (Cleveland, OH) specifies the following:

> Parent conferences should be completed well before school closes. Submit completed forms, tests and checklists in student alphabetical order to the Principal by the last day of school. Do not remove records from the premises.
>
> - All materials must be cleaned and the room left in order for the beginning of the next year.
> - All storage areas must be organized and cleaned and free from all perishables.
> - All plants and animals should find homes. Do not leave them at school.
> - Capital improvements and repairs should be listed in order of priority.
> - Common use areas shall be assigned and cleaned.
> - June and July paychecks shall be issued upon completion of the above.

Parent and Student Relations

Discipline Policy

See Chapter 8 for a discussion of how discipline policies may be promulgated to parents.

Discipline policies are as varied as there are schools. The best discipline polices include a positive vision of the child as well as an approach to conflict resolution. This policy is from The Post Oak School (Bellaire, TX):

> The Post Oak School's discipline policy is as follows: When, in the judgment of the teacher and/or head, a child's behavior is disruptive, disrespectful, cruel or unsafe to the child or others, it cannot and will not be tolerated. ...

> Each teacher is expected to develop his/her individual way of effectively addressing the usual array of behavioral difficulties which arise in the classroom and elsewhere on the school grounds. As a Montessori teacher, her/his interventions are expected to be formulated based on 1) respect for the child, 2) knowledge and understanding of the developmental needs and characteristics of the child, as well as the needs of the group, and 3) the understanding that appropriate behavior must be carefully taught and modeled. The goal of each intervention is to assist the child/ren to develop self-control and self-discipline. The manner in which each intervention is made is expected to reflect a patient attitude and to consist only of verbal and, when appropriate,with a younger child, gentle physical assistance. ...
>
> When a child demonstrates an inability to respond appropriately to ordinary disciplining, and/or is otherwise signaling through behavior that s/he has needs that are not being met, the teacher should respond in a proactive way by meeting with the child's parents to discuss concerns. At this point the teacher might also want to consult informally with her/his colleagues or other qualified persons for input regarding alternative approaches to assisting the child. If these efforts do not lead to an acceptable resolution of the teacher's concerns and interventions continue to be ineffective, or in situations when the teacher feels s/he cannot appropriately communicate to the parents within context of usual direct parent contact, the teacher follows the procedures established for eliciting administrative assistance as they are outlined in The Post Oak School's Support and Resolution Procedures for Teacher Concerns About a Child.

The Support and Resolution Procedures referenced here are discussed in more detail below, under Resolution of Parent and Teacher Concerns.

This public Montessori school policy, from North Avondale Montessori School (Cincinnati, OH), is reprinted from NAMTA's publication *Implementing Montessori Education in the Public Sector* (1990):

> "To let the child do as he likes when he has not yet developed any powers of control, is to betray the idea of freedom."—Maria Montessori
>
> At North Avondale Montessori School it is important that the child clearly understands the rules and possible consequences for violating rules. There is no doubt we all agree that our children are our most valuable gifts. Through nurturing and sensitivity, we hope to prepare them to function as social assets rather than as social liabilities. With this in mind, it is important this understanding is reflected in methods of discipline used at home and school.
>
> Our approach is to lead the child towards self-discipline. We try to avoid spending unnecessary time responding and reacting to behavior problems. The Montessori method addresses the need to effect change towards positive behavior through lesson planning or teaching. Another famous quote by Maria Montessori is "The undisciplined child enters into discipline by working in the company of others; not by being told he is naughty." Discipline is, therefore, primarily a learning experience and less a punitive experience if appropriately dealt with.
>
> In the Montessori class, the child's opinion is respected and the child is asked to share his or her view. Children want to follow the rules if the adult clearly defines the rules and then invites the child to assume responsibility for his or her behavior. Assuming

responsibility for behavior is to understand and accept the consequences for violating rules.

Children whose rights are violated by physical harm are asked to report this problem to the nearest adult or any available adult rather than hit back. This instills the practice of following legal procedures we adults must follow as we seek help from law officials when our rights are violated.

Discipline Procedures and Possible Consequences

First Offense

1. The teacher explains or reviews class or school rules and warns of possible consequences.

Second Offense

1. The teacher personally communicates problem with child's parent(s).

2. Teacher applies appropriate consequences.

3. Teacher sends a written report home and a copy to the office.

Third Offense

1. Teacher again communicates problem with child's parent(s). The TEACHER applies appropriate consequences.

2. Teacher requests a conference with administrator and child.

3. Same as #3 above.

4. Administrator reviews with teacher what future disciplinary steps will be taken from the office.

Fourth Offense

1. Teacher sends the child to the office with a written report.

2. The administrator will communicate problem to parent(s) and apply appropriate consequences.

Possible Consequences:

Fighting may lead to out-of-school suspension.

Unruly conduct in the classroom may lead to isolation from group.

Playground problems may lead to temporary suspension from playground activities.

Unruly conduct on the bus may lead to temporary suspension or expulsion from riding the bus to and from school. The consequences are defined by the department of transportation (see pages 23-26 in the handbook).

Proven theft may lead to some financial penalty if the item is not returned.

Chronic Behavior Problems:

For unusual behavior problems we suspect are beyond a child's control, we refer the problem to our personnel in Support Services (visiting teacher, school psychologist).

Through these individuals, outside help is sought through local community health and social service agencies. Parents are contacted to share in the recommendation for additional help. Psychological and visiting teacher reports are shared with the teacher and parents. These reports are filed.

See code of suspension, expulsion and removal of students; Board Policy 5113.2 (in the school office).

Parent Communication

It is important to remind staff that parent communication is an essential part of their job and to suggest professional approaches. Lake Country School (Minneapolis, MN) gives the following guidelines:

> The school has a special Board committee whose responsibility is communication. The following avenues of communication are available: the Tuesday Memo compiled by the Office Administrator and distributed weekly, the Parent Handbook distributed at the parent orientation in August, the Staff and Board Handbooks, parent/teacher conferences in fall and spring, parent workshops and the Parent Education Series, year-end reports, and the Lake Country Courier (for which staff members are expected to contribute articles). Please submit notices for the Tuesday Memo to the Office Administrator by Friday afternoon the week before.
>
> Communication with parents happens any time a staff member speaks with a parent on the phone, casually in the hallway or in the parking lot, or in a formal conference. We all have a responsibility to make parents or visitors feel welcome and connected to the school. It is important to take advantage of these opportunities to help parents understand the Montessori method and what happens in the classrooms at Lake Country School. If a casual encounter turns into a mini-conference, it is appropriate to suggest that the parent schedule a conference with the teacher.

These guidelines are from The Post Oak School (Bellaire, TX):

> **Introduction**
>
> The following is a summary of the article by Robert L. deBruyn, "Techniques To Get Parents To Take You Seriously", from *The Master Teacher*, vol. 23, no. 9.
>
> Teachers should work towards having more contact with parents and having more influence with parents. The points listed below may be helpful:
>
> - We must be aware that parents enter relationships with us with wide ranges of emotions. It is important to establish a climate of equality, or of mutual dependence, so that faculty and parents will accept one another's input as serious.
> - When talking with parents, a teacher should focus on the individual child rather than on the needs of the group.
> - Purposes and goals of meetings should be made clear to parents well before a meeting occurs so that the parents will be prepared with a plan of action.
> - Allow yourself to listen to parents with your heart as well as your head.

- Be prepared for agreement without gloating. Be prepared for disagreement with points to support your beliefs and recommendations.

- Avoid generalizations and judgmental statements. Instead, give specific examples of behaviors without labeling the behavior.

- Before a conference ends, provide closure by recapping the discussion and decisions. Give the parents a written summary of the meeting and include your phone number.

Phone Calls & Parent Contact Form

Return parent calls promptly after school. The school office will not give out a teacher's home phone number. Telephone conversations are best kept to a minimum as face to face meetings are usually more productive. Talking with parents at arrival and dismissal is not appropriate. Supervision of children is crucial at these times and the only responsibility of teachers. If a parent persists, inform them firmly and politely that teachers and assistants are not permitted to speak with parents at dismissal.

Although teachers are not required to keep a log of parent contacts throughout the school year, this practice is recommended. For important phone calls, please complete the Parent Contact Form and submit a copy to the Head. Keeping the Head aware of parent concerns helps him to support your work in the classroom and prepares him for intervention.

Parent Reading File

Please submit to Head of School a copy for review of all notes, newsletters, permission slips, etc. which you intend to send home to your families. These will be filed in the Front Office in the Parent Reading File. From time to time excerpts will be printed in the Post Oak Weekly. We encourage all classroom teachers to communicate with their families frequently, but at least monthly via a class newsletter.

Guidelines & Strategies for Working with Parents

The three handouts from *The Master Teacher* that deal with various aspects of more formal parent contact (Working to Resolve a Child's Behavior Problem; Planning Parent Conferences; and Handling Difficult Parent Behavior) are included for your perusal.

In general, close friendships with parents are difficult and often counter-productive. If this situation arises, please retain professionalism and avoid conversations about children or staff connected with the school.

Support from the Head

Parents will be directed to the classroom teacher first with any complaints or difficulties. If the issue cannot be resolved, intervention from the Head will be necessary. At all times keep the Head apprised of information he may need to know should a parent request intervention.

Any information or concerns about a child are discussed with parents only in a privately scheduled conference. Inform the Head before a "difficult" conference and request his presence when and if it's needed.

Conference Forms

In the Fall and Spring there are special days set aside as parent conference days. About a month in advance each teacher will be asked to submit to the receptionist the days and times for his/her conference schedule. Parents will call the school to arrange conference times. Teachers are asked to contact parents who have not responded to notices.

Teachers may recommend that parents observe their child's classroom prior to a conference.

If a teacher is unable to schedule a child's conference, documentation of same must be filed in the child's records. If the teacher deems it necessary to schedule a conference with a parent but is having difficulty doing so, then the Head needs to be contacted for support.

Teachers will complete the Conference Forms before the student's conference.

Teachers are required to submit in a folder a copy of these forms in alphabetical order to the Head promptly after the completion of conferences. It is important to advise the Head in writing of any conferences which reveal significant information about a student or a family. The Head will read the forms and your notes. The conference forms will be filed by the Admissions Director with the student's records in the admissions office.

Additional conferences may be scheduled at any time if the teacher wants to share concerns or if the parent requests a meeting.

Progress Reports

At the end of each semester the teacher will complete each child's Progress Report. Teachers are required to submit these reports in alphabetical order to the Head who will read and approve them before they are mailed home by the Office. Then a copy will be filed with the student's permanent records.

Post Oak Weekly Newsletter

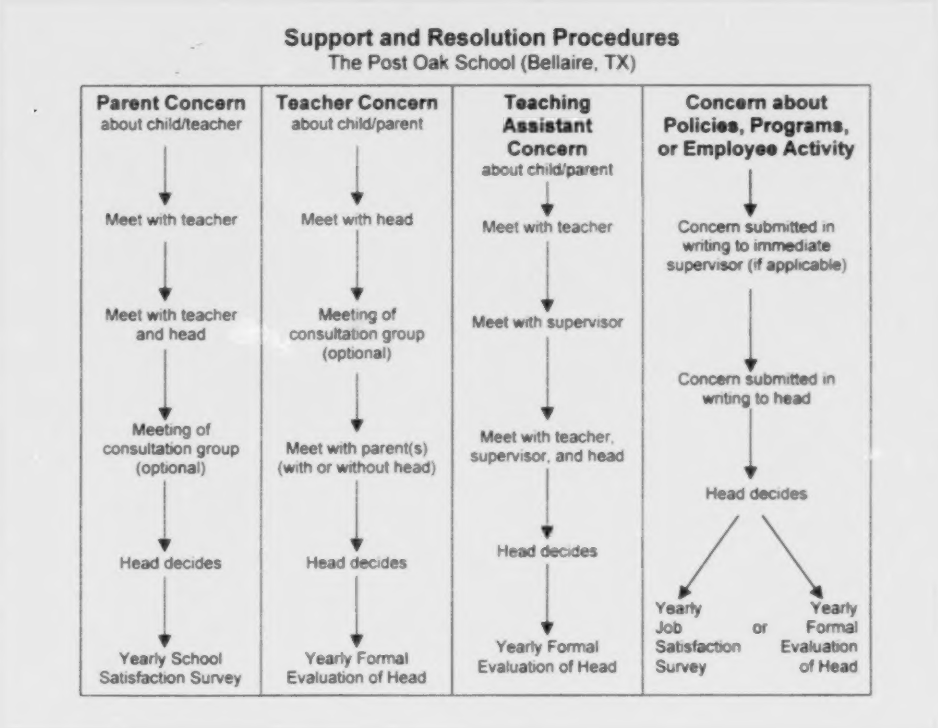
The Head in conjunction with the Post Oak Parent Association sends out a newsletter every Thursday to share pertinent information about the Post Oak community. This is an important communication vehicle for the school as well as an outlet for parent education. Teachers are encouraged to submit articles, reports, information regarding classroom activities, trips, or workshops attended. Please submit a copy to the Head prior to inclusion in the newsletter.

Resolution of Parent or Teacher Concerns

See Chapter 8 for information on parent handbooks.

These procedures are usually given, sometimes with less detail, in the parent handbook as well as the faculty handbook. The support and resolution procedures of The Post Oak School (Bellaire, TX) specify clear procedures, including both appropriate action and documentation, for four types of concerns: parent concern about a child and/or teacher, teacher concern about a child and/or parent, teaching assistant concern about a child and/or parent, or concern regarding policies, programs, and activities of school employees. The school's faculty handbook outlines the procedural steps for each type of concern and provides succinct flow charts (see Fig. 1) for an overview. The following excerpt addresses the first type of concern, a parent concern about a child and/or teacher:

> Any faculty/staff member or parent with a school concern is encouraged to discuss the matter directly with the individual(s) involved as soon as possible. If a discussion does not resolve the matter or if a discussion appears to be impractical, the following procedures should be implemented:
>
> **I. Parent/Child/Classroom Concerns**
>
> *A. Parent concern about child and/or teacher*
>
> 1. Step One
>
> a. Action: Meeting with teacher
>
> b. Documentation: Parent Concern Form, Level 1 completed and signed by parent and teacher
>
> *If the concern is not resolved:*
>
> 2. Step Two
>
> a. Action: Meeting with teacher and head
>
> b. Documentation: Parent Concern Form, Level 2 completed and signed by parent, teacher and head
>
> *If the concern is not resolved:*
>
> 3. Step Three (optional, as recommended by head)
>
> a. Action: Meeting of Consultation Group composed of teacher, head, faculty member of teacher's choice, and faculty member or administrator of head's choice
>
> b. Documentation: Parent Concern Form, Level 3 completed and signed by each member of the group
>
> c. Head informs parent in writing of final determination regarding the parent concern.
>
> *If the concern is not resolved:*
>
> 4. Step Four
>
> a. Action: Inform the head who makes a determination regarding the concern and specifies any further action(s) to be taken
>
> b. Documentation: Parent Concern Form, Level 4 completed and signed by parent (Part A) and head (Part B)
>
> *If the parent is dissatisfied with the resolution:*
>
> 5. Dissatisfaction should be communicated
>
> a. immediately and directly to the head, in writing, and



Support and Resolution Procedures
The Post Oak School (Bellaire, TX)

Parent Concern about child/teacher
Meet with teacher
Meet with teacher and head
Meeting of consultation group (optional)
Head decides
Yearly School Satisfaction Survey
Teacher Concern about child/parent
Meet with head
Meeting of consultation group (optional)
Meet with parent(s) (with or without head)
Head decides
Yearly Formal Evaluation of Head
Teaching Assistant Concern about child/parent
Meet with teacher
Meet with supervisor
Meet with teacher, supervisor, and head
Head decides
Yearly Formal Evaluation of Head
Concern about Policies, Programs, or Employee Activity
Concern submitted in writing to immediate supervisor (if applicable)
Concern submitted in writing to head
Head decides
Yearly Job Satisfaction Survey
or
Yearly Formal Evaluation of Head

Figure 1.

b. to the Faculty, Administration, and Board of Trustees via the yearly School Satisfaction Survey which is distributed to parents in the spring.

Hiring and Conditions of Employment

Equal Employment Opportunity

A statement of equal opportunity should be placed on applications as well as in the personnel handbook.

See chapter 9 for more information on equal employment opportunity, requirements for employment, and suggested hiring practices.

Requirements for Employment

Many employee or operations handbooks contain a list of employment requirements, including health and background checks, citizenship or work eligibility, required training or education, and any required forms.

Hiring Procedure

Hiring sequences should be put in writing. An appropriate place for them is the employee handbook or operations manual.

Contract Renewal

It is a good idea to specify in the employee handbook just how important it is to renew contracts in a timely fashion. A timetable of deadlines for offering, discussing, and accepting contracts should be included, as demonstrated here by Lake County School (Minneapolis, MN):

> Teachers' contracts are offered by the Principal in the first week of February and should be returned to the Principal by March 1. Anticipated changes in contract terms are requested in writing by the Principal prior to February 1. Teachers are requested to inform the School in a timely manner if they are considering seeking other employment or planning to request a sabbatical. Due to the difficulty of recruiting AMI-Montessori trained teachers, especially on the elementary level, Lake Country School often requires a lead time of one year or more to sponsor and train a new teacher.

Staff Attendance

See Chapter 11 for suggested staff meeting topics and ideas

Some schools specify attendance rules, especially as related to after-school events and staff meetings. Promulgating a regular schedule of faculty/staff meetings in the employee handbook helps employees to plan ahead and avoid scheduling conflicts. The employee handbook often specifies expected daily work hours and procedures for calling in sick or arranging for personal days or other scheduled time off.

Non-teaching staff are usually entitled to overtime pay for working more than 40 hours in any week. Teaching staff are usually considered exempt from overtime rules.

This policy, from The Post Oak School (Bellaire, TX), is succinct and specific:

> **Participation/Attendance at School Functions**
>
> The School and Post Oak Parent Association sponsor evening workshops, meetings, open houses, and study groups during the school year. The faculty is expected to participate in the classroom related meetings and events, the Parent/Teacher Banquet, the Halloween Carnival and the Annual Fundraiser (Cinco de Mayo). If you cannot attend one of these functions, please speak to the Head.
>
> Faculty will participate in the creation of a school year time line in order to avoid conflicts and clusters of activities requiring our presence.
>
> **Faculty Meetings**
>
> Faculty meetings will be held on Tuesdays three times a month. Full faculty meetings are held on the fourth Tuesday from 4:00 to 5:00 PM. All teaching staff is required to attend. Minutes will be kept at each meeting. If you must be absent due to an emergency or illness, you are responsible for the content of the meeting and any policy changes or procedures discussed. Special meetings may be scheduled occasionally.
>
> Departmental meetings are held on the first and third Tuesdays from 4:00 to 5:00 PM. These meetings are designed to assist in level planning, to allow open discussions of

relevant issues, and develop genuine communication among faculty in each department.

Metropolitan Montessori School (New York, NY) has an explicit teacher absence policy:

> **Attendance and School Hours**
>
> All teachers and staff who are going to be absent or late to school should notify the Head of School by a telephone message left on an answering machine at 212 932-9638 no later than 7:00 AM. This procedure is not necessary if you have given notice the previous day. When you are absent, you are required to provide instructions for the person covering you.
>
> Teacher attendance is critical. Teacher absence causes disruption in class coverage as well as in many other out of class activities. These absences require maneuvering other teachers for coverage, thereby extending the disruptions. They should be for sound medical reasons only. Personal business, non-emergency medical appointments, vacations, and so on, should be scheduled during the many school holidays. Personal days will not be allowed the day before or after a school holiday. Absences other than for serious reasons formally approved by the Head of School are unacceptable and may result in a reduction in pay or probation. If a teacher is compelled to be absent, she or he must notify the Head of School.
>
> Teachers are expected to report to school by 8:00 AM (for Upper Elementary, and all Specialist classes including Physical Education, Art, French, Spanish and Music) and 8:15 a.m. (for all others) each morning and be available in school until 4:00 PM each afternoon. In addition, there are necessary meetings (special groups, staff meetings, parent conferences) which may require occasional attendance beyond normal hours. School functions, as noted on the academic calendar for each year, may also occur in the evenings or on weekends.

Lake Country School (Minneapolis, MN) specifies required teacher preparation time before and after the official school year as well as making it clear that teachers must participate in lunchroom and playground supervision and staff development events:

> **Absences/Leaving the School Building**
>
> An employee's presence is essential to each and every LCS position. LCS therefore reserves the right to authorize or refuse to authorize the advance request of an employee for permission to be absent. Employees who have not given advance notice of an absence and who find that they cannot report to work because of an illness or an emergency must notify the Office as soon as possible. In the event of an illness, an employee must call the Office at school as soon as possible after 7:00 am. Unauthorized absences, excessive absences or the failure to give proper notice of an absence will subject you to disciplinary action and/or termination of employment, as will repeated instances of tardiness. An unauthorized absence of two consecutive days will be grounds for immediate termination.
>
> If you leave the school during regular hours, with or without children, you are required to inform the office of your destination and time of return.
>
> Staff will not be reimbursed for mileage while on school business.

Other Time Commitments

1. Staff Meetings—In addition to expected time commitments with the children, teachers and administrators are expected to attend bi-monthly staff meetings from 4:15 to 5:30. These are meetings for the entire staff to discuss current concerns and occasionally address professional growth issues or receive reports of staff committees.

2. Level Meetings—Level meetings are held bi-weekly with specialists attending alternate levels every other week. Junior High meets weekly. These meetings are less formal and can be negotiated with colleagues.

3. Pot Lucks—Three times a year staff pot lucks are held instead of regular staff meetings from 5:00 to 8:00 pm. This time is used for extended discussion.

4. January Retreat—All teaching and administrative staff are expected to attend the January retreat. It is a time for essential communication and team building fun. This requirement results in greater commitment to one another and our work. Friday evening is optional; Saturday and Sunday are required.

5. Community Responsibilities—In general, all staff should attend events that support parent understanding of Montessori and of LCS and that contribute to community morale building and involvement. All teachers are expected to attend the fall parent workshops; attendance at the Silent Journey workshop is rotated among the staff. Teachers should attend the January Open House; attendance at the fall open house is rotated among staff. Staff are also expected to participate in other community events, such as the winter holiday party, the spring auction, graduation and the year-end picnic. Staff are welcome at the class potlucks and other events arranged by the Parent Involvement Committee, but attendance at these events is neither expected nor required.

6. Lunch/Playground Supervision—In addition to teaching responsibilities, teachers are called upon to share responsibilities of lunchroom and playground supervision. This schedule will be available in late August. (For behavior expectations of students, see "Day-to-Day Responsibilities with the Children.")

7. Parent Conferences—Twice yearly, in the spring and fall, teachers are required to be present for individual conferences with parents. This usually involves one full day and one half day for Children's House and Elementary, and one full day and two late afternoons for the Junior High. For part-time teachers, these conferences are considered professional responsibilities and time needs to be reasonably negotiated, i.e., conferences for parents who miss and wish to re-schedule are up to the discretion of the part-time and full-time teacher.

8. Professional Development Days—Up to eight days per year are taken off from work with the children to enhance the development of staff professionally. Two of these days are parent conference days and the remaining days are scheduled for speakers or topics to be discussed by the whole staff. Generally the mornings are set aside for discussion and the afternoons for work on environments. In addition, one floating professional day may be taken to visit other schools or attend special seminars or conferences. These must be arranged with the Principal at least one month in advance.

9. Teacher Preparation Days—These days are the contracted days from August 20 until the first day of school at the beginning of the academic year and the days following the last day of school in the academic year through June 20. The staff meets frequently to prepare, evaluate, and communicate during these periods. This is also time to work on environments.

Code of Ethics

A code of ethics embodies the spirit of professional behavior and practices. The following code of ethics from the Montessori School of Northern Virginia (Annandale, VA) is a good example:

Professional Educator's Code of Ethics

Confidentiality: includes personal information about children and families, organizational problems, and individual faculty matters. All records, files, conversations and conferences are held for the benefit of the child and are strictly confidential.

Respect for the Child: includes a positive, optimistic attitude about children, a cooperative spirit, a nurturing of independence, a recognition of unique individuality, trust in the child's work, finding the right activity and listening to and observing in order to follow the child. One should avoid pride and anger, speaking ill of the child, sarcasm, teasing, over-reacting to misbehavior, and implied reward and punishment. One should be sensitive to the child's desire to be held or touched. When making presentations, the child's interest level should be considered so that one stops before the child tires. Phrasing of instructions should be direct and to the point. When communicating with the child, come down to the child's height.

Preparation of the Environment: includes developing a complete Montessori program, caring for the environment including animals, plants, and Montessori materials, and initiating change in order to provide new stimulation.

Parent Education: includes the dissemination of Montessori principles, recognition of parents as primary educators, accessibility of information regarding individual children, and communication about general classroom activities.

Good Staff Relations: include working and socializing cooperatively; remaining non-judgmental of staff; demonstrating trust and respect; maximizing communication through staff meetings, celebrating holiday events, program support, and school-wide projects. Malicious comments, gossip, and other harmful behaviors should be ignored and suppressed.

Professional Improvement: includes upgrading skills, participation in Montessori workshops, keeping abreast of current educational developments, and open-mindedly seeking ways to improve teaching techniques and the classroom environment.

Problem Solving: includes discussing problems with the person who can make the change that is needed or seeking reasons why the change cannot be made. Someone acting in an assertive way makes clear, direct, non-apologetic statements about his/her expectations and feelings, criticizes in a descriptive, rather than a judgmental way, persists in following through on issues even if s/he meets resistance, listens to others' views respectfully, and negotiates and compromises.

Professional Conduct: includes keeping private affairs outside of the workplace, maintaining agreements at all levels regarding performance of duties, being sensitive to the needs of individual children and staff, directing concerns to the appropriate party, abiding by the regulations and policies of the school, and supporting the mission of MSNV.

Personnel Records

All representations in the faculty file must be complete and consistent with school specifications. In case of litigation, a faculty file with incomplete representation or inaccurate credentials may be determined to be school negligence. Confidentiality of personnel files is the responsibility of the head of school, as demonstrated in this policy, from Old Brooklyn Montessori School (Cleveland, OH):

Confidentiality. Personnel records are highly confidential and must be handled with utmost care. These records will be handled solely by the Principal, except in unusual and exigent circumstances. The Board of Trustees may review employee personnel files as necessary to carry out its official duties.

Information Collected and Retained. OBMS will request, use and retain only that personal information about employees that is required for school business or by law. The following information will be included in the personnel files:

- Employment application and related documents
- Montessori diploma, transcripts, teaching credentials
- Written performance evaluations
- Letters of commendation or other indications of excellent performance
- Reprimands or other written disciplinary records
- Grievances and resolutions
- State Certificate

Release of Information. OBMS will not release information to outside sources without the employee's written consent except for employment verification, criminal background check, and special litigation requirements (investigations, subpoena, judicial orders, etc.).

Periodic Reviews. The Principal will periodically review each employee's personnel file. Information deemed unnecessary or inappropriate by the Principal will be removed from the files and destroyed.

Employee's Rights. Employees may review their personnel files at reasonable times during business hours. Arrangements should be made through the Principal who may authorize employees to coordinate the personnel file review with the school secretary. Employees are not authorized to remove the personnel files from the school office or to remove any information contained in the files. Such action may result in disciplinary action, including termination. An employee may take notes and/or request single copies of any page in the files, during the employee's review of his or her personnel file.

An employee may request that the Principal remove any inappropriate, improper or unnecessary material from the file. If the Principal refuses to eliminate the offending material from the employee's file, the employee may directly petition the Board of Trustees. Any such petition must contain the employee's name and position at the school; a complete description of the offending material; and the reasons and an explanation as to why the material should be removed from the employee's file. The Board will schedule a meeting to hear the employee's grievance and shall provide the employee with notice and an opportunity to address the Board at this meeting.

Leave and Time Off Policies

Leave generally falls into one of several categories. *Sick leave* usually ranges from five to twelve days per year. Some schools permit employees to accumulate unused sick days up to a maximum total allowed in any one year. Sick leave is usually not allowable before or after a holiday or vacation period without medical verification. Many schools include two to three days of *personal leave*, not to be used in conjunction with holidays or vacations. Schools that include personal leave do so as a way of respecting the individual needs of staff. *Professional leave* is sometimes granted for study or for giving presentations at local or national Montessori workshops. *Professional development days* are often built into the school calendar for whole-faculty professional development events at the school; most schools also grant a certain number of "floating" professional development days for attendance at local or national Montessori conferences or workshops. Year-round employees are given *vacation*, often with the stipulation that it be taken when school is not in session. Finally, schools often specify a policy for unpaid *leaves of absence* for maternity/paternity, family needs, or other personal reasons.

See Chapter 11 for information on professional development formats and topics.

Old Brooklyn Montessori School (Cleveland, OH) gives a succinct summary of types of leave allowed:

> Sick Leave. Sick leave will accrue within the limits of one year at the rate of one day per month. Sick Leave accrues at a rate of one day of paid sick leave for each full calendar month of full-time work, including paid vacation time. Sick leave may be pro rated for less than full time work schedules. Sick leave is not carried over from one fiscal (or school) year to another. Paid sick leave is to be used by employees only for the duration of their own personal illness or medical disability.
>
> Employees are required to telephone or otherwise advise their supervisor of an illness or medical disability by 6:30 a.m. of each workday.
>
> Unpaid sick days will be deducted from the employee's salary on a daily rate basis.
>
> A certificate from the attending physician may be required by the administrator to verify the illness or medical disability. The certificate must contain a recommendation on the proper medical course of action and return-to-work plan. Any sick leave beyond five days requires this certificate before the employee can return to work.

Sick days that occur immediately before or after vacation must be verified by the employee's attending physician.

Personal Leave. A teacher may apply for two days of personal leave for absences due to personal emergency for situations not covered by sick leave. Written application including the reason for absence must be submitted to the principal for approval. Personal leave shall not be granted to teachers with more than eight days absence.

Professional Leave. Permission may be granted by the Principal of OBMS to teachers and other instructional staff members to attend educational or business meetings or seminars without loss of pay. A summary of the course or meeting must be submitted to the Principal of OBMS.

Maternity/Paternity Leave. Leaves for pregnancy, child birth and/or child care reasons may be granted without pay for up to one year; however, leaves for maternity may be covered in part by accumulated sick leave and earned vacation time at the option of the employee and the administrator.

Leave for Jury Duty. When an employee receives a notice requiring jury duty service, the employee must immediately provide the Principal with a copy of the notice. No employee summoned to served as a juror shall be discharged, or threatened with discharge, provided the employee gives reasonable notice prior to the commencement of service and the employee's absence is due to actual jury service. (O.R.C. §2313.181)

Unanticipated Absence from Duty. Whenever possible employees must provide the Principal or Administrator with advance notice of anticipated or expected absences from duty. However, when an employee must be absent from duty for short periods of time due to illness or other unforeseen events, the employee must do the following:

- Notify the Principal at his or her home between 6:30 a.m. and 6:45 a.m. of the date of absence; teachers must also call the classroom assistant or co-teacher;

- Lessons and other information prepared by the teacher must be conveyed to the assistant or co-teacher;

- Employees must indicate the severity of the illness and attempt to project the anticipated duration of absence;

- A call must be made each morning during the employee's absence if he or she has been indefinite as to the duration of the absence;

A call need not be made each morning if the employee has stated a definite term of absence. A phone call should confirm the expected return of the employee and a progress report should be provided at least once a week.

Lake Country School (Minneapolis, MN) gives a more comprehensive list of types of leave:

Vacations

All year-round employees shall take their vacation time on days when classes are not in session, e.g. winter, spring, or summer vacation times or professional development days when topics to be discussed do not require their participation.

Vacation times shall be requested in writing at least one month in advance and are subject to the approval of the administration. Granting of vacation time shall be dependent upon timeliness of requests and needs of school.

If days other than listed above are desired (i.e. days when school is in session), personal days may be requested, using the established procedure for requesting such.

Holidays

LCS normally observes seven holidays each year. Employees are generally informed at the beginning of each school year of the specific holidays which LCS observes. However, LCS usually recognizes the following holidays: Christmas Day, New Years Day, Memorial Day, 4th of July, Labor Day, Thanksgiving Day and Presidents' Day. Staff in attendance at Staff Retreat also receive Martin Luther King Day off.

When observance of a holiday results in a loss of work time, regular full-time employees receive holiday pay for their regularly scheduled hours at their straight time rate of pay. Part-time employees are eligible for holiday pay on a pro-rated basis.

Sick Leave / Personal Leave

Full-time employees may use up to eight (8) days of paid sick leave each school year. For regular part-time employees, the amount of sick leave is based on the average number of hours worked per week. So, an employee who works four (4) full days per week may use up to 80% sick leave. In accordance with MN law, sick days may be used for your own illness or to care for a sick child.

Two personal days may be taken in lieu of two (2) sick days. Personal days are paid days that the employee is scheduled to work but does not work, for whatever reason. Use of personal days may include but is not limited to religious holiday observations or family occasions, such as weddings or reunions. Personal days must be requested in writing and submitted to the Office Administrator at least one week in advance. Personal days will be approved on a first come, first served basis, and no more than one employee may take a personal day on any given day. Personal leave will not be approved for the days immediately prior to and after holidays. The Principal at her sole discretion may approve additional personal days in lieu of sick leave for emergencies not covered by other types of leave.

A maximum of eight (8) unused days of sick leave may be carried forward from one school year to the next school year. However, any sick days which have been carried forward may not be used as personal leave. Sick time will not be cashed out upon termination of employment and is not transferable to other employees.

Parental Leave

Regular full-time and part-time staff who have been employed by LCS for at least twelve (12) consecutive months immediately preceding a request for parental leave, who have worked for an average number of hours per week equal to one-half the full-time equivalent position in the employee's job classification, who are natural or adoptive parents in connection with the birth or adoption of a child, are eligible for an unpaid leave of absence for up to six (6) weeks. LCS will grant an additional three (3) weeks if the employee requests. Vacation time can be used to cover this leave of absence.

This leave must begin within six (6) weeks of the birth or adoption; however, in cases where the child must remain in the hospital longer than the mother, the leave may begin within six (6) weeks after the child leaves the hospital. This leave should be requested at least two (2) weeks in advance if possible.

School Conferences

In accordance with MN law, unpaid time off up to a maximum of 16 hours annually is available to all regular full and part time employees who have been employed by LCS for at least twelve (12) months immediately preceding, for attendance at school conferences and classroom activities which cannot be scheduled during non-working hours. If the employee's child receives certain child care services or attends a pre-kindergarten regular or special education program, the employee may use the leave time to attend a conference or activity related to the employee's child, or to observe and monitor the services or program, if these activities cannot be scheduled during non-work hours. When the need for the leave is foreseeable, the employee must provide reasonable notice prior to the leave and must make a reasonable effort to schedule the leave so as to not disrupt the operations of LCS.

Voting Leave

Employees are encouraged to vote and permitted the necessary time off. A reasonable period of time will be allowed at the beginning or end of the work day for purposes of voting, if polls will not be open for a reasonable period of time before or after working hours.

Jury Duty Leave

Employees who are called for jury duty should notify the Office Administrator immediately. As required by Minnesota law, employees are given a leave of absence upon presentation of the jury summons for purposes of responding to the summons, serving as a juror or jury duty. Employees called for jury duty (who have completed their orientation period) are paid the difference between their regular pay and jury duty pay. Because of the great difficulty in finding substitute Montessori teachers for any extended period of time, teachers are requested to ask that they be excused from jury duty. Employees should notify their supervisor upon being excused from jury duty on any day for which they are regularly scheduled to work.

Military Leave

Military leaves of absence are granted to employees in accordance with existing federal law. Returning veterans will be reinstated according to the law in effect at the time of their return.

Funeral Leave

When a death occurs in the immediate family, an employee may request up to three days off with pay. Unusual circumstances, such as extended travel or other complications, may warrant additional time off at the discretion of the Principal. The immediate family for the purposes of funeral leave consists of the employee's partner, child, siblings, parent or grandparent.

Benefits

The federal Employee Retirement Income Security Act (ERISA) governs the presentation of benefits to staff. It requires that all benefits be promulgated in writing, which most insurance companies will prepare for an employer as a matter of course. The law also requires equal benefits for equal staff, and therefore if a staff member does not need a benefit, a waiver must be signed. Consult an attorney when setting up benefit packages of any kind regarding the specification of the ERISA law.

Health Benefits

Most schools offer health benefits to full-time employees, paying all or most of the premium. Sometimes a board may choose to pay for all but one month's premium, just to remind employees that there is a real cost to the medical benefit. Although health benefits are expensive, they are essential to the wellbeing of employees and to the recruitment and retention of a strong staff. In some geographic areas, small businesses have banded together to obtain group coverage at a rate comparable to the rate paid by large companies. A group policy that offers employees a range of options–HMO, preferred provider, open choice, etc.–is optimal.

Death and Disability Insurance

Provisions should be made for staff coverage in the event of death and disability. If a staff member becomes disabled during the year, at least eighty percent of his or her salary should be insured by an insurance company or self-insured by the school in order to respond humanely to a serious accident. Life insurance is usually nominal, but always a good idea. The school should consider about $5,000 in term insurance per individual in order to make some contribution to a bereaved family.

Tax-Deferred Annuity or Retirement Plan

Most schools do not have a retirement plan, but both employee and employer can contribute funds to a tax-deferred annuity, often available from a life insurance agent. A contribution of four to five percent of salary is an appropriate benefit, especially for senior staff. So often, salaries of senior staff are not much higher than for starting teachers (due in part to the overall low salary range and the shortage of qualified teachers). Therefore, adding a TDA contribution after several years' employment may be an appropriate way to reward long-term commitment.

See Chapter 3 for a discussion of salary scales.

Tuition Subsidy, Waiver, or Scholarship

It is fairly standard policy to offer a tuition subsidy or other tuition assistance to faculty/staff children. A typical policy is a subsidy of one-half the normal tuition. Some schools do not offer this benefit because they feel it discriminates against the childless teacher. Although economically this is true, such a comparison is discouraging to those faculty who provide a unique enrichment to the school because they are both teachers and parents. Moreover, not giving some tuition help can reduce faculty morale. Most schools agree that the faculty level of income is well below the mean income level of the parents, and therefore the benefit makes sense.

On a business level, a school with full enrollment loses revenue when it gives scholarships to staff children, whereas a school with enrollment shortfall has little to lose. The benefit may become more expensive as the school fills up and as tuition increases. At a large school, the sheer number of potential staff children may make this benefit high-risk. To defray its cost, some schools establish a fixed funds source for faculty scholarships, which is increased from year to year in keeping with tuition increases. Other schools require that teachers enter the scholarship application process. Still others give scholarships to staff children based on need

Professional Development

Larger schools offer financial support for professional development, ranging from $600 to $1000 per teacher. If funds are limited, it is usually appropriate for the school to pay tuition or registration fees for events and for the teachers to pay for travel. Generally it is advisable for the teachers to pay some of the cost to indicate personal investment and to further their appreciation and quality use of the event. In addition to providing tuition support for in-service participation, some schools also give pay increases based on accumulated in-service time.

Teachers are expected to show evidence of continuing growth, either by formal graduate credit or by other approved activities that will demonstrate their concern for their professional competence. Teachers are often asked to submit in writing evidence of continued growth by listing association memberships and/or meetings attended. They can document professional growth by demonstrating innovative approaches to curriculum, record keeping, parent communication, effective development or any enrichment pertinent to their classroom or the overall benefit of the school. Another avenue is for teachers to provide consultation for the head of school or other teachers in the development of the school.

Sabbatical Policy

A sabbatical (traditionally offered during the seventh year of employment, reflecting its root word, *Sabbath*) is a leave of absence with partial salary for professional renewal through a specific course of study (a university course, an additional level of Montessori training, etc.). Usually there is a requirement of two to three years of service at the school following the sabbatical year. Although for some schools the granting of a sabbatical is prohibitively expensive, the sabbatical can be seen as a preventative approach to teacher burnout.

The following sabbatical policy is from Franciscan Montessori Earth School (Portland, OR):

The purpose of providing sabbatical leave is to encourage staff to develop themselves professionally with a long range commitment to the school.

1. A minimum of six (6) years experience at the FMES shall be required.

2. Requests for sabbatical shall be made one (1) year prior to the proposed leave. All sabbatical leaves must be approved in writing by the Administrator.

3. Applications shall be accompanied by a written planned program of study. An affidavit will be signed by the applicant promising to return to the FMES and to work three (3) times the amount of time of the leave. A one (1) term leave would require three (3) terms of service.

4. Sabbatical leave salary shall be computed as one-half ($\frac{1}{2}$) of the employee's daily wage for each contracted day the employee is in college or on sabbatical plan. An employee will not forfeit the subsidy for medical insurance or salary increment to which he/she would be entitled if in continuous service. Regular payroll deductions for taxes, etc., shall be made from the salary granted the employee. The salary advanced in a standard contract year by the school during the term(s) of the leave will be considered an interest free loan. Said loan shall be canceled after repayment of required service. Repayment must be made on a pro-rated basis if subsequent service is not fulfilled (interest at Portland Teachers Credit Union rates). The rate of interest will be the average rate during the time of the sabbatical. A contract for repayment will be drawn up by the F.S.E. Board and the Administrator.

5. In case of injury or illness to the employee during the leave, which prevents completing the purpose of the leave, the sabbatical leave and salary subsidy will be terminated. These provisions will take effect on the first day following notification of illness (or injury) to the FMES Administrator, verified by a medical report from the attending physician. After illness or injury as described above, upon release by appropriate medical authorities, the employee will be, when possible, returned to regular duty for the remainder of the school year or shall be reinstated on sabbatical leave. If unable to return to service, then repayment is required.

6. An official transcript or grade slips indicating satisfactory completion of course work for which the leave was granted must be given each academic term or semester to the FMES Administrator within a reasonable time after each term or semester.

7. A staff member on said leave must be enrolled for not less than twelve (12) graduate hours, or the corresponding hours on a semester basis. Exceptions must be approved by the Administrator.

8. A sabbatical plan other than completion of courses must be approved by the Administrator with procedures to monitor progress and development of the plan.

9. If evidence has been obtained that a teacher on said leave is not fulfilling the purpose for which the leave was granted, the employee must report to the Administrator, who may terminate the leave and/or the teacher's employment. The Teacher shall be given an opportunity to be heard by the Administrator regarding the alleged abuse. If there is abuse, the school will require repayment of all or part of the sabbatical leave salary paid to the employee and any insurance premium subsidy paid.

10. Upon the employee's return from sabbatical leave, the Administrator shall reassign him/her to a position.

See Chapter 11 for a full discussion of faculty evaluation.

Faculty Evaluation

A policy statement about evaluation should be brief and general, allowing for evaluation instruments to evolve with the complexity of the school. The following statement is from Old Brooklyn Montessori School (Cleveland, OH):

> The Principal shall devise appropriate instruments of personnel evaluation and will annually undertake the evaluation of all education and staff employees. These reviews will take place before new contracts of employment are issued and shall take place no later than April 15th of each year. The Principal shall keep records of all personnel evaluations for each teacher, assistant/teacher aid, specialty teacher and other employee.

Grievance Procedures

It is important for grievances or complaints to be handled, not ignored. This is because an unexpressed grievance can fester and express itself in far more negative ways than the grievance itself. Most grievance procedures strongly suggest that the complainant try to work out the problem with the offender first. Then the matter is taken to the head of school and, if not mediated at that level, is taken to the board. For containment purposes, one board member should be involved, not the whole board.

The following grievance procedure from the Franciscan Montessori Earth School (Portland, OR) is reprinted from NAMTA's 1988 *Operations Handbook:*

> **Level I**
>
> Any employee expressing a complaint relating to a program activity, a possible violation of federal or state law, or the school's personnel policies is encouraged to discuss the matter with the individual allegedly responsible for the inappropriate activity, or to discuss the matter with the administrator. This should occur within three working days of the alleged act.
>
> - If such a discussion does not resolve the matter or a discussion appears to be impractical, the complaint should be submitted in writing to the immediate supervisor with a copy to the administrator.
>
> - The written complaint should be filed within five working days of the alleged incident or knowledge of the incident. The written complaint should contain the specific details describing the alleged violation of the program, law or personnel policy, and the desired remedy.
>
> - Within five working days of receipt of the written complaint, the immediate supervisor will respond in writing with a copy to the administrator.
>
> **Level II**
>
> If the complainant is dissatisfied with the response:
>
> - The complainant should then, within three working days, contact the administrator in writing, with copies to the immediate supervisor.

- Upon receipt of the complaint, the administrator will investigate and determine if inappropriate activity has occurred.

- Within seven working days after receipt of the complaint, the administrator will respond in writing to the complainant. The response, based on the investigation, will state whether or not inappropriate activity occurred and what steps will be undertaken to resolve the problem.

Level III

If the complainant is not satisfied with the resolution of the complaint by the administrator he or she may appeal the decision in writing to the board within ten working days.

- The board may conduct an investigation and will respond to the complainant within twenty working days. Their decision will be final and binding.

- If the complainant is not satisfied with the board's response, the complainant may wish to contact a national agency; for example, the State Department of Education, the Office for Civil Rights, the U.S. Department of Health, Education and Welfare, the Equal Employment Opportunity Commission, The State Bureau of Labor or the U.S. Office of Education in Washington D.C.

- While the complaint process is being implemented, if the complainant chooses to contact any of the above mentioned agencies, the school will terminate the internal complaint procedure.

Termination

A termination clause may be written so that the employee can be required to terminate immediately or continue for a specific period (generally thirty days). In all cases, the employee receives compensation for the specified period of thirty days. Termination initiated by the employee usually requires thirty days' written notice for teachers or less for administrative support staff.

Termination of contracted employees requires the following steps:

- The employee in question must be warned in writing. His or her signature indicates that the warning was read. A plan for remediation and performance evaluation should also be discussed.

- All accusations must be documented by fact. No generalization can be made regarding the employee in question. Generalizations could be regarded as defamatory–libel if written, slander if spoken.

- No personal information about the employee should be used maliciously under any circumstance in any discussion. Confidentiality must be maintained by both the head of school and the board.

- Contracted employees must be given the specific cause for termination in writing, pending disciplinary action and an opportunity to a hearing with the head of school or "fairness committee" if the head's decision is not satisfactory.

Where litigation is concerned, schools and heads usually have the legal advantage. Nevertheless, careful documentation as outlined above can help to preclude any legal question as to due process for dismissal of an employee.

The following policy, from Franciscan Montessori Earth School (Portland, OR) makes appropriate distinctions among the many types of termination:

Layoff Policy

1. Layoffs may result from budget reductions or course reductions, program changes, program or course eliminations, decreased student enrollment, financial emergencies, reorganization or other factors Administrator determines.

2. The school will make reasonable efforts including reduction of work hours, where feasible, to prevent reductions in the school work force. However, it retains the right to reduce its work force either permanently or temporarily, after other alternatives have been reviewed by the Administrative Team. The school will provide some transition counseling or other job search assistance to an employee going on layoff.

3. The school will reduce its work force on the basis of the most qualified staff for the available work, as determined by the FSE Board and Administrator. Seniority will be the tie-breaker if two employees are deemed equally qualified. Qualifications will be determined by material in the personnel file, performance evaluations, and other relevant material available to the FSE Board and the Administrator.

4. Whenever possible, employees will be given a minimum of three (3) calendar weeks notice before layoff.

Resignation

An employee desiring to resign shall submit a written resignation to the Administrator. Contracted employees must give a minimum of three (3) calendar months' notice, and other employees must give a one (1) calendar month notice prior to the effective date of the resignation.

Discharge, Demotion or Suspension

1. The school retains the right to discharge, demote or suspend any part time, temporary or probationary employee at any time for any reason.

2. Regular full time employees shall be given specific reasons for pending disciplinary action and an opportunity for a hearing with the Administrator before a decision is made, whenever possible. Regular full time employees may be discharged, demoted or suspended. Reasons may include, but are not limited to:

a) unsatisfactory work performance. Prior to such decision, the employee will be given a written warning by the Administrator, identifying the performance deficiencies, outlining improvement needs, and a schedule for subsequent performance reviews.

b) some acts, which are reason for suspension without pay, or dismissal without written warning, include, but are not limited to:

1) personal conduct which prejudices the reputation, effectiveness, or quality of the school, or a school program or service.

2) conviction of a serious crime relating to honesty or moral turpitude involving children.

3) acting repeatedly in a manner which tends to lower the discipline or morale within the school, or that adversely affects the school's responsibility to render prompt, courteous, effective and efficient service.

4) inability or unwillingness to perform assigned duties and/or responsibilities.

5) willful refusal to take direction or reasonable assignments.

6) gross or continued neglect of duty, or negligence in the performance of duty.

7) excessive or unapproved absence or tardiness.

8) striking or abusing a child.

9) harassment or discrimination.

10) willful destruction of school property or that of another person.

3. The school will endeavor to give terminated employees, except those under immediate dismissal, two (2) weeks notice in writing.

4. The advance two (2) week notice of discharge may be waived by the Administrator for justifiable reason such as safety, security, unauthorized absence, a negative impact on the reputation or operation of school programs or services. An employee terminated by immediate discharge will not receive any additional pay other than pay earned during completed scheduled days worked, holidays occurring within that period and unused pro-rated vacation.

Exit Interview

A terminated employee will have an exit interview with the Administrator or designee whenever possible.

Except in cases of substantial layoffs and/or extraordinary circumstances, the exit interview will be held on the employee's last day of employment.

The employee must complete a separation process form before the final paycheck is issued.

Conflict of Interest

Conflict of interest in relation to faculty is rare, but there are certain areas of exposure to avoid.

Around the holidays or the end of the year, faculty members may be presented with gifts as tokens of a family's appreciation. There is no real harm in accepting small gifts, but teachers should be careful about taking expensive gifts or cash; at the very least, acceptance of gifts over $50 in value should be reported to the head of school. Teachers may wish to re-direct parent gifts toward the classroom by suggesting a book or other item that all the children could use.

Likewise, teachers should be cautious about giving or accepting personal or professional services so as to avoid a feeling that a teacher owes a family a favor or vice versa. In particular, teachers should avoid offering paid tutorial services. However, if parents request tutoring from a particular teacher, the head of school should evaluate the situation and decide whether or not the arrangement is acceptable. This involvement of the head at the beginning provides third-party intervention in case of disappointment. Tutoring should never take place during school hours. In addition, be aware that tutoring only one child may be seen by other parents as favoritism.

Placing a faculty member's own child in his or her classroom has its vulnerable points, especially if other parents sense favoritism. It might create pressure on the faculty member to downplay the relationship with his or her child during class hours. Most faculty are very fair about their children in relation to other children, but perceptions can distort situations, especially if parents are afraid to approach the teacher for clarification. Generally speaking, being aware of potential problems is enough to prepare staff for misunderstandings, should they occur.

Frequently Asked Questions

How does one determine when to fire and when to not renew a contract?

It is important to make a clear distinction between the two. When an employee is fired, it is with short notice and it is due to extreme misfeasance, usually in the form of insubordination, complete failure to perform duties, etc. (see Termination, above).

When conflict is consuming the energy of the entire community, disrupting the learning process, or undermining staff cohesiveness, then the employee must be terminated prior to the end of the contract. In some cases, the discharged employee may be required to be off the premises immediately because of behaviors that are intolerable, dangerous, or extremely upsetting to the community.

Non-renewal of a contract entails a more gradual process and may result from a variety of circumstances, such as these:

- The school is being restructured and the services of the employee are no longer necessary.

- The employee's irascibility turns off parents.
- The employee negatively impacts staff morale.
- A teacher has lost interest in the job and can no longer teach.
- A teacher cannot discipline the children.
- A teacher cannot follow through on even small goals with the children.

There are infinite cases for non-renewal. These are just a few. Non-renewal gives time to both the school and the impacted individual to find alternatives for recovery. It should be a gentle and dignified process; it demands professionalism on both sides so that the finish of the year runs smoothly and without tension. It is best used when it is clear that the teacher is not performing well and is not productive in the classroom or in the school community.

When there is a rupture in relationships over issues, will grievance procedures really work?

Grievance procedures work only if both parties are operating in good faith. Of course, there will be moments of friction in any workplace, and the best solutions are worked out among those directly involved.

A conflict between head and teacher is complicated by the employer-employee relationship. If head and teacher cannot agree, the matter goes to the board (see Grievance Procedures, above). Most heads react negatively to teachers going over them, and most boards find it difficult to take sides against a head. It is clear, therefore, that appealing to the board should only be done as a last resort.

When a teacher's grievance against the head goes before the entire board, it creates an uncomfortable situation for the head, who must work with this board on other matters. For this reason, some schools appoint a board member or board subcommittee to hear grievances as an intermediate step before the grievance goes before the full board. If the single board member or subcommittee is able to decide the grievance to both parties' satisfaction, then the full board does not have to hear the matter.

Once a grievance procedure is in process, it is important that both parties refrain from discussing the matter with other staff members and especially from making negative comments.

What is the rationale for a policy handbook?

Handbooks are usually developed at the start-up of a school and may initially address the particular issues of start-up. As additional concerns emerge each year, a board member or

See Chapter 1 for information on school start-up the head often works out a policy, which usually represents recommended procedures based on the experience with the issue that has already come and gone. When a policy is formed, it provides a rationale in advance for next time the same concern arises. Having a written policy precludes labor-intensive "reinventing of the wheel" and ensures that decisions are made not on a personal basis but on an institutional basis, unemotionally, and with the child's best interest in mind.

Further Reading from NAMTA

The following articles and documents are available as photocopies from NAMTA. See Appendix 4 for ordering information.

Kahn, David. "Toward a Handmade Materials Ownership Policy." *The NAMTA Quarterly* 1.1 (1975, Fall): 34-36. 2 total pages.

Trochta, Charlene S. "The Spiritual Factor: Formulating a Policy." *The NAMTA Quarterly* 1.3 (1976, Spring): 29-31. 2 total pages.

The Process of Whole-School Development and Evaluation

School development is a composite of all development at the school–child, teacher, head of school, and parent. The school matures all of its community members. If everyone is growing, the school finds new integration and expression of its values and standards. Montessori evaluation goes to the root of the word *evaluate:* to bring out values, to discuss, exchange, give feedback so that optimal levels of engagement make for a secure and focused learning dynamic. School management by goals and objectives has its place, but evaluation as a whole-school process seems fitting for a holistic learning approach like Montessori. Goals and objectives are targets; far more important is the dialogue that comes from reciprocal relationships among all community members in reaching those goals and objectives.

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The whole truly is more than the sum of its individual parts; and the school's story is more than any one person's narrative. The challenge of an evolving school is to integrate the various voices and perspectives into a cohesive story that powerfully communicates the school's vision. Evaluation and professional development, in this larger sense, mean enhancing the potential of all community members while integrating personal purpose with shared community purpose. The leadership of the head of school is critical to this process.

Creating a Climate of Continuous Evaluation

Evaluation is a natural human trait that propels the community to continually improve and advance. Evaluation is built into Montessori pedagogy in self-correcting materials, stimulating questions, critique, and observation. Evaluation also needs to be built into the work of the adults and children in order to improve and further develop the school.

Development and evaluation go hand in hand. Of course the child's development is paramount, but the interrelated evaluation of the adults who work with children–both professionals and parents–is essential to the child's continued growth and success. So the Montessori definition of evaluation (to bring out values) must be configured around the child and must include all responsible adults.

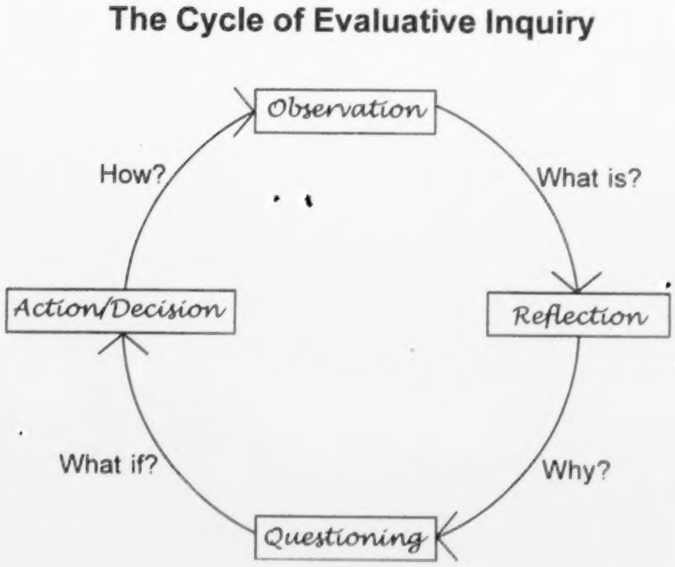

Figure 1.

To create a climate of evaluation, the head of school actively encourages a cycle of evaluative inquiry within the school. This cycle is a dialectical process, leading to and building on new insights, improvements, and refinements. The process is life-giving, for without a deepening reflective process, evaluation actually runs the risk of arresting growth.

There are four key elements in the cycle, all of which are interrelated (see Figure 1).

- **Observation:** What is really happening? What is the basis for our statements and opinions? Careful observation is essential to any meaningful evaluation. Observation is more than looking and listening; too often we see and hear only what we want or expect. The challenge is to observe without bias or prejudice.

- **Reflection:** What does this mean? How does this fit with my/our experience or values? Reflection upon observations gives attention to details and seeks to **make sense of** them. Does the observation validate or challenge assumptions? Reflection helps us to see patterns and make connections.
- **Questioning:** Why? What would happen if ...? I wonder how ...? In many ways, questions are more important than answers because they lead us to new insights and discoveries. Our questions, based on observation and reflection, lead us to propose possible answers as a way of investigating, perfecting, and creating.
- **Action/Decision:** What will I do? How will I do it? Decision and action are ways of testing our ideas, improving our practice, finding a different or better solution. They spring from our questions, but do not lead, by themselves, to the answers. The answers evolve as we continue the cycle of inquiry, again observing the results or effects of actions and continuing through the circular pattern.

It is easy to short-circuit this process by going from observation to immediate action or decision. This can result in reacting to circumstances without much reflection or questioning, which is not always the way to derive the most growth out of problem-solving.

The head of school must encourage a cycle of evaluative inquiry in all circumstances in order for evaluation to become built into the life of the entire school organism. This cycle should become pervasive in both *intrapersonal* dialogue (personal self-evaluation and action on one's own) and *interpersonal* dialogue (parent, teacher, and child discussion with group decision-making). In this climate, the community integrates specific practice with philosophy, shares information, and connects operations with vision. It is the heart of a Montessori environment.

The Cycle of Evaluative Inquiry between Child and Teacher

Introduction

Evaluation of children in the Montessori program is not a matter of getting the subject across and then testing a child on what is "learned." Margaret Stephenson's famous statement sets the tone for what Montessori evaluation is all about:

> If we are studying life, not a child in a class, we are faced with something different from a person who has to be taught, someone who has to work at certain things for certain periods of time, someone who has to reproduce what has been assimilated, someone who will reach a certain standard of educational achievement, someone who will be granted a certain mark for work done, someone who will work and play well with others. This is not a child to be reported on, marked, graded, classified, labeled, but a living organism following a pattern of development.[1]

The cycle of evaluative inquiry transforms evaluation into a process whose purpose is to assist the natural tendencies of child and to *observe* first-hand if the child is getting the help that is needed.

Observation

In the preschool, the fundamental approach to Montessori evaluation is observation. AMI Trainer Emeritus Hilla Patell gave the following pointers on observation in a lecture in Phoenix, AZ, in 1989:

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[1] Stephenson, Margaret E. Foreword. *The Secret of Childhood*. By Maria Montessori. Trans. M. Joseph Costelloe. Notre Dame: Fides, 1966, xiii-xxvi.

> From the Montessori point of view, the purpose of observation could be thought of as the cornerstone of our work. It is the indispensable part which makes our work come alive and become meaningful. It is a tool which enables us to follow the child's spontaneous manifestations not with the aim of studying the psychology of the child, but in order to refine our own thinking and understanding so as to be able to give the life of the child the help that it has the right to receive. ...
>
> In order to be objective we should not allow our perception to become clouded by personal preferences and prejudices, nor by personal expectations. It is a real struggle when one is trying to be objective not to allow past experiences to overshadow the observation of the moment ... A useful practical discipline for oneself while observing is to keep awareness in the present—this simple but effective technique allows us to gather the necessary information without judging, assuming, labeling situations or individuals or reacting to situations.

Observing Normalization

Fundamental to Montessori curriculum implementation is the concept of normalization. Normalization is the process whereby a child moves from being undisciplined to self-disciplined, from disordered to ordered, from distracted to focused. It occurs through repetition of some piece of work that captivates the child's attention. Normalization represents an "inner change," which may take place quite suddenly and leads to deep concentration. Its characteristics include a sense of order, a love of work, profound focus, love of silence and working alone, sublimation of the possessive instinct, power to act from real choice, obedience, independence, initiative, and cooperative learning–all in the context of freedom.[2] When observing manifestations of normalization, teachers have a true measure of the intrinsic interest and motivation the child is experiencing in the work.

Annette Haines has developed a simple scale for recording teachers' observations of what she terms "concentration events":

> A concentration event involves a focusing of attention, a limitation of movement, the use of the hand, and repetition with a degree of precision or exactness. The true test would be to observe a "polarization of attention" and repetition with a piece of material used "for the purpose for which it was constructed" (Montessori, *Spontaneous Activity in Education*). There may be visible signs of pleasure or happiness when a child is engaged in a piece of work freely chosen—and this kind of work should appear to produce little fatigue.[3]

Haines' research established a way to reliably measure concentration by asking observers to rate children's "concentration events" on a scale of 1 to 5, with 1 representing "no concentration" and 5 representing a "high level of concentration."

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[2] Futrell, Kathleen H. *The Normalized Child.* Cleveland, OH: NAMTA, 1998.

[3] Haines, Annette Mallett. *Universal Interest Levels in Early Childhood: Montessori's Theory of Sensitive Periods.* Unpublished dissertation. Edwardsville, IL: U. of Southern IL, 1997.

Observing at the Elementary and Adolescent Levels

As the child progresses to subsequent stages of development, the personality changes, and therefore what there is to observe is different. A "concentration event" for an elementary child, for instance, is not determined merely by what is observed externally but by the actual execution and quality of the child's work. Is the child able to do the work at hand? Can the child verbalize the process to another student or to the teacher? Is there an intellectual excitement about the work? How is the imagination being elicited? Is there keen social interest in working with other children around a topic or a project? What depth and productivity are inspired by the work?

In conjunction with her research, Annette Haines has produced a videotape, *Spontaneous Concentration in the Montessori Prepared Environment*, to assist observers in using her concentration scale. Copies of the video are available from NAMTA at $20 plus shipping. Consult the current NAMTA catalog for shipping cost.

The adolescent, by contrast, needs to be observed for emerging identity. How does work strengthen the personality by making the student a contributing member of the community? How is the work part of the adolescent's sense of social responsibility? What affirms the adolescent's vision and honesty about growing up in the world? Is the adolescent in touch with the need to improve and develop skills? Is the adolescent willing to express concerns, emotions, and thoughts about growing up with peers while facing the issues of future development, both personal and societal? What are the student's prevailing interests, and what engages him or her? Observation is essential in seeing this young person in the state of becoming, looking for his or her potential, and eliciting what Montessori called the "hidden treasures" of the adolescent even when they are barely perceptible.

Record Keeping as a Tool for Reflection

An on-paper record of the student's progress is necessary to provide a report to parents and the head of school, an outline for parent conferences, and a transcript for the child's permanent record. In the event of teacher turnover, solid record keeping provides the incoming teacher with a basis for meeting a new group of children and quickly assessing their needs.

More fundamentally, however, record keeping is a guide for the teacher's planning, an opportunity to reflect on observations, recognize patterns, and begin to look for guiding explanations. Good records inform the process of questioning, which leads to action/decision in the form of lesson planning.

Anecdotal Records and Work Curve Charts

Close to Maria Montessori's own methods of record keeping, the anecdotal approach provides rich material for the parent conference and for teacher planning simply because it describes firsthand the emerging individuality of the child and his or her potentialities. Paula Polk Lillard gives the following example of a teacher's journal entry:

> The map of Europe is out now. Anna said, "I want you to show me that!" pointing to it. Karen joined us for the presentation and then made a map, too. When I showed the girls Greece, Anna said in a surprised voice, "That's where I come from! My grandpa was Greek!"[4]

Work curve charts, usually used only at the 3-6 age level, give a clear analysis in graphical form of patterns of behavior and work choices that build concentration (see work curve chart in this chapter's Sample Documents). Work curve charts are very time-intensive for the teacher or assistant and therefore cannot be maintained for all children at all times. One way to use them is to track the work curve of a few children at a time over a two- or three-week period, moving on to other groups of children in successive weeks until the entire class has been covered. Or they can be used to identify the needs of one or more children who present a particular challenge to the teacher. Work curve charts are useful in parent conferences because they are easily explained and provide a snapshot of the child's daily work and patterns of concentration. Often work curve charts are simply too hard to do, and therefore anecdotal records about the work cycle should be considered.

Paula Polk Lillard first published one year of classroom journals as *Children Learning* in 1980. It has been republished with a new introduction and under a new title, *Montessori in the Classroom* (New York: Schocken, 1997). Order through your local bookstore: ISBN 0-8052-1087-3.

Conferences and Work Diaries

At the elementary level (ages 6-9 and 9-12), the student's own work journal may replace the teacher's work curve chart. In some Montessori elementary classes, a daily journal or "work diary" kept by each child makes the child a partner in his or her own assessment and planning. Keeping a journal helps the child assume a feeling of responsibility and ownership of his or her education.

The journal is a simple log of the child's time and activities for the day. It is important that journals be kept current and that the children be in the habit of using them daily When the journal concept is first introduced, this may require scheduled times, such as before lunch and before afternoon dismissal, for filling out the journal.

The journal is used in a personal conference between child and teacher, which takes place once every week or every two weeks, depending on the child's needs. In addition to the journal, the child brings to the conference all work done since the last conference.

At the conference, the child discusses work that is completed and work planned for the future. The child may request presentations for which he or she feels ready, and these may be scheduled right onto the teacher's planning sheets. If there has been work in one or two particular subjects, the child and teacher may decide to schedule presentations in subjects that have been inactive. Also, productivity and work habits can be discussed. For example, when a child spends two hours doing four multiplication problems, it may indicate a need to have the lesson repeated or to have help with motivation, self-discipline, time management, and social life. The agreement between child and teacher in relation to task completion should be seriously followed up at the next child-teacher conference. Accountability is part of the journal and conference process, and therefore goals should be clear, achievable, and completed under the consistent observation of the teacher after the child defines the work to be finished.

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[4] Lillard, Paula Polk. *Montessori in the Classroom*. New York: Schocken, 1997, 83-84

Character Profiles

Because Montessori considers the whole child, observations and records also include "character development" observation forms, which evaluate social and moral development as well as intellectual habits. Character traits are listed on a form, with space for a few sentences about each one. This form is sometimes enriched by an anecdotal record. A few schools give number ratings to these areas, which, though not a particularly Montessori approach, does provide a quick "shorthand" method of keeping records.

The character profile can be used as notes for a parent conference, with the printed profile either given to parents at the end of the conference or mailed after the conference. Sometimes discussing the child's character traits with the parent results in a collaborative effort whereby the character profile is refined and revised. In this case, the teacher revises the profile and mails it to the parent. In any case, it is important to discuss the character profile with parents face to face in order to avoid mailing out a reductionistic "report card" view of the child's developing character.

Below are a few examples of the sets of traits used by various schools for character profile forms:

- **Typical 3-6 Level:** Concentration, Independence, Obedience, Social Development, Gross/Fine Motor Control, Motivation, Grace and Courtesy, Auditory Comprehension, Self-Confidence, Sense of Order, Sense of Responsibility.
- **Typical Elementary Level:** *Self:* Concentration, Independence, Order, Self-Confidence, Self-Motivation, Coordination. *Social:* Cooperation with Adults, Cooperation with Peers, Leadership, Organization, Following Rules, Initiative. *Moral:* Behaves Responsibly, Considers Others, Helps Others, Has Sense of Justice.
- **Normalization (for 3-6 Level):** Love of Order, Love of Work, Love of Silence and Working Alone, Mutual Aid and Cooperation, Profound Spontaneous Concentration, Obedience, Independence and Initiative, Profound Self-Discipline, Attachment to Reality, Sublimation of the Possessive Instinct, Joy.
- **Multiple Intelligences** (must know the theory of Howard Gardner in order to implement): Intrapersonal, Interpersonal, Linguistic, Logical-Mathematical, Spatial, Bodily-Kinesthetic, Musical.

Case Studies

A case study is built over a child's entire stay in a class, typically a three-year cycle. It is based on anecdotal information gleaned from teacher observation as well as interviews with the child and the parents. The data collected over this extended period of time is written up in narrative form and usually organized around a set of variables or traits so as to ensure consistent reporting on all children (see case study in this chapter's Sample Documents). Ana Maria Villegas suggests the following variables: a positive attitude about school, inner security and sense of order, pride in the physical environment, abiding curiosity, a habit of concentration, habits of initiative and persistence, ability to make decisions, a sense of independence and self-confidence, self-discipline, and a sense of responsibility to other members of the class, school, and community.

Typically, the teacher summarizes the anecdotal information each year in two or three pages and presents it to the parents at a conference, perhaps in lieu of the character profile described above. At the end of the child's stay in the class, the case study is compiled for the entire three-year cycle and passed along to the child's new teacher as the child transitions to the next age level (usually, however, a case study is not sent to a different school when the child transfers).

As with the work cycle charts described above, case studies are time-consuming for the teacher to maintain. As an alternative to using them for the entire class, some teachers choose to keep a case study only for exceptional children whose development might be better understood through such a thorough record. In addition, a case study can be useful to a tutor or child psychologist in the event of a referral. Although not many teachers have time to do case studies, they are done by a few teachers who regard reflection and research as an important part of the Montessori experience.

Practice and Mastery Checklists

In the 1970s and 1980s, many schools created checklists, listing each piece of Montessori apparatus and its direct aims. These checklists often included a detailed list of the steps involved in each activity (e.g., mat: carrying, unrolling, rolling, unfolding, folding). The teacher would use one checklist per child, noting the date when each step was practiced and mastered for each material. The checklist later evolved into a shortened form, simply naming the materials and omitting the detailed steps. The format most often used today is simply a list of student outcomes that includes only a partial listing of materials or no materials list at all.

The model in Figure 1 might represent the next stage in the development of checklists. It provides spaces to check off both material passages and observed behavior surrounding a single material, as well as a space for anecdotal comments. This approach would further customize the checklist and allow for deeper reflection on what is happening between the child and the material. Such an approach records the sequences ("passages") the child uses with the material, rather than emphasizing mastery. The sequences themselves suggest what is being

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Villegas, Ana Maria. "Two Sample Case Studies." *Implementing Montessori Education in the Public Sector.* Cleveland Heights, OH: NAMTA, 1990, 469-475.

The Stamp Game

Material Passages

Addition:

- ☐ Static Addition
- ☐ Dynamic Addition

Subtraction:

- ☐ Static Subtraction
- ☐ Dynamic Subtraction

Multiplication:

- ☐ Static Multiplication
- ☐ Dynamic Multiplication

Division:

- ☐ One Digit
- ☐ Two Digit

Child's Responses

- ☐ Sustained time on task
- ☐ High concentration level
- ☐ Initiative and independence
- ☐ Invents own problems
- ☐ Uses exchanging
- ☐ Can do all exchanging processes for addition and subtraction
- ☐ Can verbalize role of multiplier
- ☐ Can complete problems
- ☐ Can intuit and apply role of divisor
- ☐ Verbalizes process

Please write anecdotal information here:

Figure 1.

learned. A full series of checklists based on this model is yet to be developed, but Figure 1 is an example of a preschool-level material subjected to full analysis of its passages and related child responses.

Standardized Tests

Of Montessori elementary classes NAMTA surveyed in 1984, 98% used standardized tests. The most common choices were the Stanford Achievement Test, California Achievement Test, Metropolitan Achievement Test, or Iowa Test of Basic Skills. Montessori schools use tests because they communicate with non-Montessori schools. Most schools give tests toward the end of the academic year.

For more detailed reading on assessment instruments, see the suggested articles in this chapter's Further Reading from NAMTA

Achievement test scores become part of the student's permanent record and are often presented to parents in a conference with the teacher. It is important to interpret the scores in the context of the teacher's personal observations about the child derived from work with the materials in the Montessori classroom. Neither students nor teachers should be judged by the test, since it usually measures cultural advantages and natural aptitude in addition to classroom achievement. Tests provide feedback about basic skills and how the child compares with others the same age, indicate strengths and weaknesses in verbal and mathematical performance, and predict future success in traditional testing.

Montessori Assessment: The Challenge Ahead

This outline provides a basis for thinking about appropriate instruments specifically designed to measure the unique characteristics and curriculum of the Montessori environment. As of this writing, there are no Montessori-specific assessment instruments, so most schools rely on standardized testing (see A, below). Ideally, however, student progress should be assessed by a variety of instruments, including the following:

A. Quantitative Norm Referencing: utilizes standardized tests for a national reference. Examples include the Iowa Test of Basic Skills, the California Achievement Test, and the Stanford Achievement Test.

B. Criterion-Referenced Evaluation (Performance-Based Checklists): measures student outcomes with the Montessori curriculum at a certain age. This would establish a closer link between student outcomes and the Montessori curriculum. The evaluation would need to be designed by both Montessorians and outside assessment experts.

C. Qualitative Evaluation: includes rating forms, checklists, and narrative descriptions, primarily in the social area. Variables to consider include the following, suggested by Ana Maria Villegas:

1. Positive attitude toward school;
2. Inner security and sense of order;
3. Pride in the physical environment;
4. Abiding curiosity;
5. Habit of concentration;
6. Habits of initiative and persistence;
7. Ability to make decisions;
8. Sense of independence and self-confidence;
9. Self-discipline; and
10. Sense of responsibility to other members of the class, school, and community.

D. Ethnographic Inquiry: focuses on the functioning of students and teachers in Montessori classrooms. Such inquiry would provide a means for contrasting the functioning of Montessori students with that of students enrolled in traditional classrooms. This comparison is integral to assessing the quality of education in factors such as time on task, independence, self-motivation, and responsibility.

Questioning

After teachers reflect on their observations, they must then begin to question what meets the needs of children. In addition to specific questions focused on the behavior and needs of individual children, general questions can lead to overall improvements in the prepared environment and in the teacher's own work. Questioning is where the teacher holds him- or herself accountable for successful work with the children. This kind of questioning is the very basis of growth and creative problem solving in a teacher.

Questions: The Prepared Environment

The following questions on the prepared environment are from Hilla Patell's 1989 Phoenix lecture:

- Is the focus within the prepared environment on the development of the whole personality, taking into account the child's physical, social, emotional, intellectual, and spiritual needs, or is it on gaining skills and acquiring knowledge?
- Do the children have the freedom to fulfill their developmental needs?
- Are opportunities provided that allow the growing child to achieve successive levels of independence in thought and in action?

- Does the environment afford a place where the child can act independently, direct his or her own life, and thereby become conscious of his or her own growing powers and abilities?
- Are the children given the responsibility to contribute to the care of the environment so that they feel a sense of belonging, a sense of self-worth?
- Do the children have the opportunity to acquire social skills through constant interaction within a community situation?
- Are we aware of the many facets of order that should be prevalent within the prepared environment, including the directress who presents with exactitude?
- Do we keep in mind the principles of moving from simple to complex experiences with an added challenge at each stage?

Questions: The Teacher

The following questions can lead to decisions and actions related to the teacher's own performance. They can be used privately by the teacher alone or in consultation with the head of school or a more experienced teacher.

- Am I engaging the students in all areas of the curriculum?
- What professional development am I doing to meet children's needs? What other teachers on the staff or in the community know more about addressing these needs?
- What individual goals do I have for children who are not becoming engaged? How am I using my assistant to provide more support for individual needs? Can we do more?
- What am I doing to keep a positive view of the class as a whole and of those children who are more demanding of my attention?
- How am I getting the children's work to be more independent and less teacher-initiated through different points of interest, redirecting to new interests, and persisting in the child's completion of a task?
- How am I encouraging socialization of the children in my class?
- What are we doing to utilize the outdoor environment for large motor work?
- How do the children benefit from going out or field trips?
- How can my head of school help me?

Action/Decision: Lesson Planning

Teacher planning comes in response to observation, reflection, and questioning. Lesson plans formalize the teacher's decisions about what to do and how to do it. Yet lesson plans should at all costs follow the child. Therefore, especially at the weekly and daily level, lesson plans should be flexible enough to allow adjustments according to the changing needs of the child.

Annual

Annual planning is never rigid; one should always do annual plans in pencil. The point of annual planning is to see the whole. One can set up plans by weeks, months, or even seasons. The broader the sweep, the more flexibility is possible (see annual plan by season in this chapter's Sample Documents).

Weekly

From annual planning comes weekly planning, which is always influenced by the recursive process of observation, reflection, and questioning. Many teachers work from the three-strand system, with children grouped according to what presentations they need, which often fall into cycles by age. Within the three-year age grouping in the classroom, then, there is a first-year cycle of presentations, a second-year cycle, and a third-year cycle (see age-level cycles in this chapter's Sample Documents). Although these age-level cycles exist in planning, it is important

FUTURE MONTESSORI EVALUATION AND EDUCATIONAL REFORM

The following is an abstract of a suggested line of research that would allow universal acceptance of Montessori in the public sector as well as provide evaluation approaches that correspond to its highest aims.

Currently, Montessori is in need of up-to-date empirical research to gain recognition of its achievement in both private and public sectors. Despite the widespread growth of Montessori, its significant contribution remains surprisingly insulated from the current educational reform dialogue so pertinent to public-sector development. Why?

1. Montessori research has historically lacked a basic standard as to what constitutes *bona fide* Montessori practice.
2. A clear statement of optimal developmental outcomes has not yet been made.
3. The necessary cross-referencing of Montessori outcomes with twentieth-century developmental psychology and related empirical data has not been accomplished.
4. Montessori research (as distinguished from *practice*) has been hampered by historical terminology begging clarification and modernization.

Without an articulation of these components, there is little chance for the emergence of a realistic understanding and assessment of Montessori theory and practice and for the Montessori contribution to become heard.

Montessori's contribution can be invaluable because educational reform does not have a consistent developmental theory or curriculum, reaching from infancy to adolescence, rooted in practice, and assessed for specific developmental outcomes. The impact can be even more far-reaching with the new work emerging in the Montessori movement around the adolescent.

A research project would need to address these concerns by:

- Identifying optimal *patterns* of development in childhood according to Montessori theory. These patterns can then be linked to key *outcomes* articulated in the Montessori literature, its teacher training models, and classroom practice. Assessing these outcomes will entail the operationalization of *concepts* and the development of appropriate assessment tools for each level of maturation. Linking the stages together will show the continuity of learning tendencies throughout the life span and articulate measurable manifestations which indicate optimal engagement (normalization or *flow*) across life stages. Finally, the project will link developmental activities of early childhood, childhood, and adolescence with desirable adult outcomes.
- Placing the *patterns*, *outcomes*, and *concepts* so delineated in the context of other models of development:
  - A) modern holistic interactions (e.g. the *flow* theory of Mihaly Csikszentmihalyi)
  - B) stage theory (e.g. the developmental theories of Erikson, Steiner, Jung, Piaget, and Vygotsky, the moral development theories of Kohlberg, etc.)
- Elucidating the tasks and environmental conditions that promote the attainment of these objectives at successive levels of development.

to resist easy categorization by age level. The three-strand planning system is more of a set of guidelines drawn from an annual plan, which insures that all presentations are made each year. Planning should include all lessons in the teacher's album for the age group being taught.

Weekly plans for both preschool and elementary can be highly individualized, beginning with individual observations of the children and their needs. In the case of the elementary, subsequent grouping of children according to those with common needs allows for more efficient and animated group lessons (see group lesson plan in this chapter's Sample Documents). At the preschool level, lesson presentations are usually done on an individual basis.

Frequently Asked Questions

How can a Montessori teacher have standards of achievement and still follow the child?

This is the ultimate question. What comes from the teacher and what comes from the child perplexes every Montessori teacher. Usually goals and objectives serve as general guidelines for presentations whose sequence comes from the teacher's Montessori album. However, the presentation of the materials is relative to individual needs; even group lessons at the elementary level are planned based on who needs what presentations. Lacking a clear sense of what there is to present will inevitably allow a class to drift away from the Montessori prepared environment and its offerings.

One might divide philosophies of implementation into two schools of thought–*structuralists* and *essentialists*. The structuralist looks to the sequence of the materials and the connection of one material to the next, asking what the logical next step is. The child is given "sequences for discovery" in the planning of lessons. The essentialist focuses on the child's interest and allows the child to independently initiate lessons from the presentations. The essentialist also believes the child's work should be spontaneous rather than designed or assigned. Teachers can learn to adjust their teaching style knowing they must steer between the structure of the prepared environment and student's spontaneous interests. Once teachers understand these dichotomies of approach, they can begin to construct a blend of that which meets the needs of individual children.

What if a teacher has been giving glowing reports about a student, but the achievement test scores come in low?

Teachers should understand that their awareness of incremental improvement and positive views of their children's efforts mean that they see their children in the best possible light. Children need to feel that their teachers appreciate and accept where they are. When the child does poorly on a test, the teacher may feel obliged to explain the results to parents. What needs to be emphasized is that the child may not be a good test taker, or that efforts shown during the year have the teacher convinced that the child will make adequate progress because of improvements in skills and attitude over a period of time. At the same time, test scores that reveal undetected difficulties not raised in previous conferences should be presented to parents only after the teacher reviews the errors made on the test and understands the child's difficulty. Finally, tests should be downplayed as only a reality check, not nearly representative of the child's full array of talents or character development.

Further Reading from NAMTA

The following articles and documents are available as photocopies from NAMTA. See Appendix 4 for ordering information.

Duax, Tim. "Report on Academic Achievement in a Private Montessori School." *The NAMTA Journal* 20.2 (1995, Spring): 145-147. 3 total pages.

Haines, Annette M. "Montessori and Assessment: Some Issues of Assessment and Curriculum Reform." *The NAMTA Journal* 20.2 (1995, Spring): 116-130. 8 total pages.

Hatch, Thomas, & Howard Gardner. "If Binet Had Looked Beyond the Classroom: The Assessment of Multiple Intelligences." *The NAMTA Journal* 21.2 (1996, Spring): 5-28. Reprinted from *International Journal of Educational Research*, 1990. 13 total pages.

Hunter, Jeremy Paul. "The Importance of Engagement: A Preliminary Analysis." *The NAMTA Journal* 24.1 (1999, Winter): 119-131. 7 total pages.

Kendall, Sharon Dubble. "The Development of Autonomy in Children." *The NAMTA Journal* 18.1 (1993, Winter): 64-83. 10 total pages.

Selden, Ramsay. "Assessment and Reform." Presented at NAMTA conference on educational reform, Washington, DC, February 28-March 3, 1991. *The NAMTA Journal* 16.2 (1991, Spring): 164-167. 3 total pages.

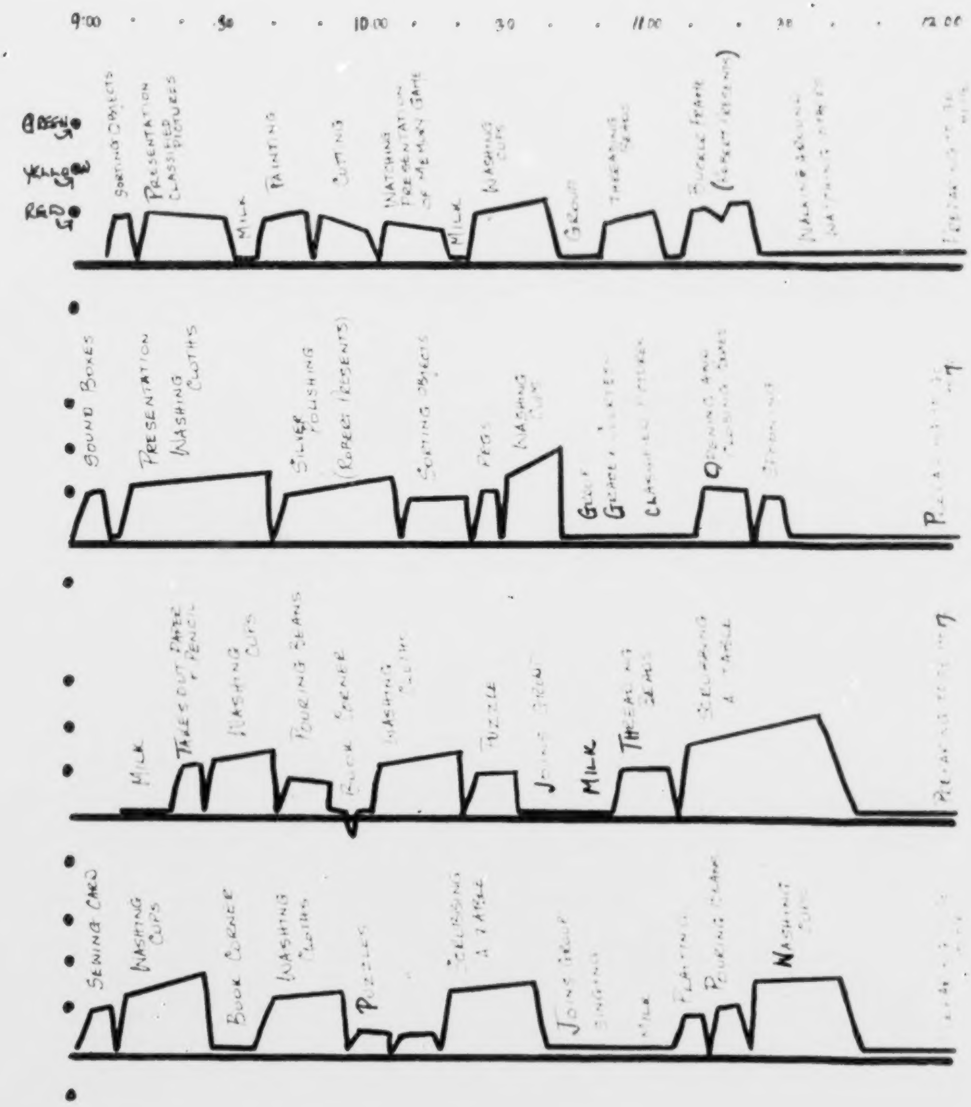
Spontaneous Concentration in the Montessori Prepared Environment [videotape]. Dir. Annette Haines. 1997. $20 plus shipping. Call NAMTA (216-421-1905) for current video shipping rates.

Warburton, Edward. "Multiple Intelligences: Past, Present, Future." *The NAMTA Journal* 24.1 (1999, Winter): 209-223. 8 total pages.

Sample Documents

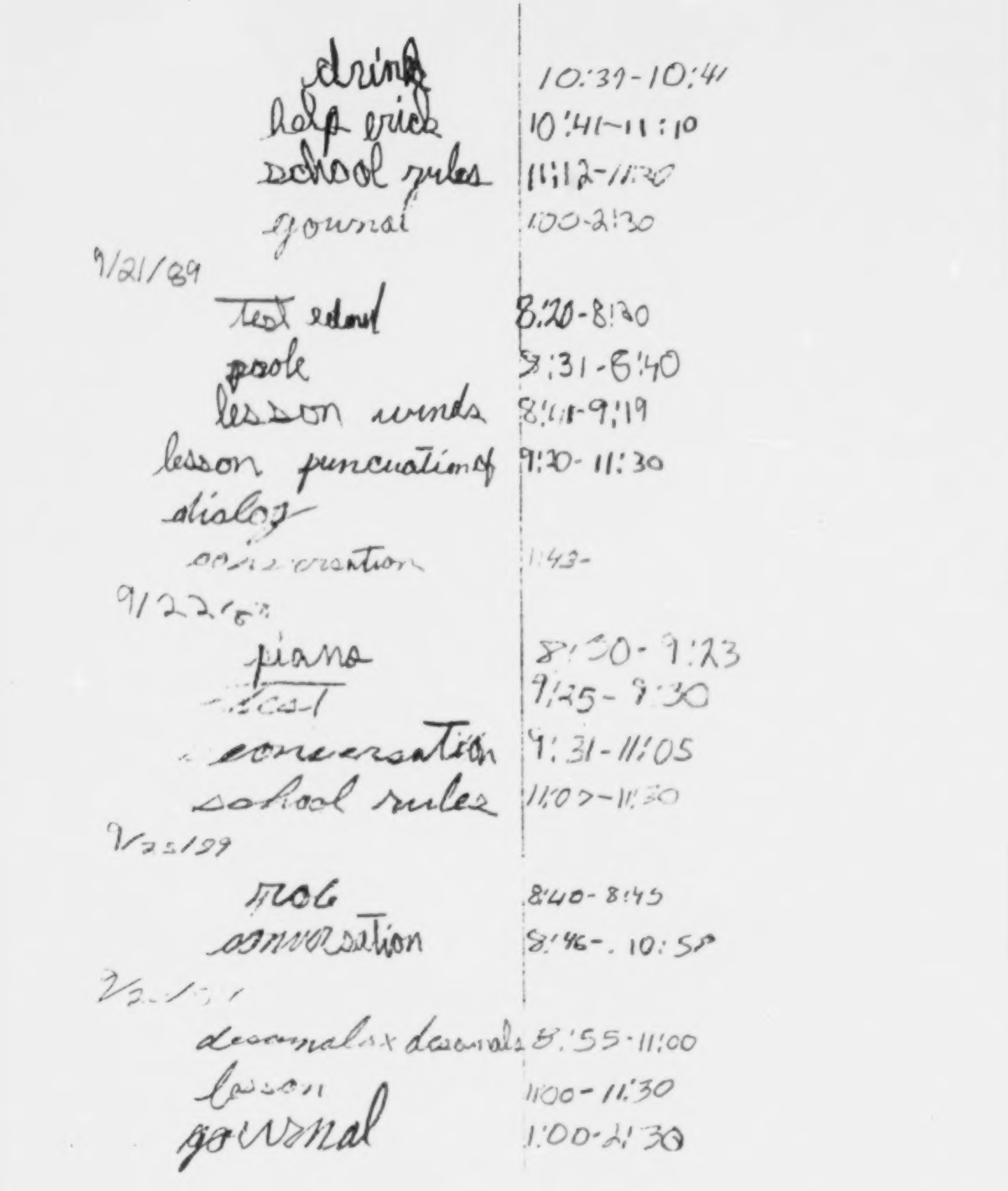
The following documents illustrate common practices in Montessori school operations. To view documents at full size, photocopy and enlarge.

Work Curve Charts



These work curve charts, for one child over a period of one week, shows three gradations of activity above the "line of quiescence" and one gradation below it, indicated by dots at the left of each day's chart. Patterns of interest, regression, and progress within the three-hour uninterrupted work time are demonstrated. (Reprinted from NAMTA's *Implementing Montessori Education in the Public Sector,* 1990.)

Page from a Child's Journal



drink	10:39-10:41
help erick	10:41-11:10
school rules	11:12-11:30
journal	1:00-2:30
9/21/89	
test [illegible]	8:20-8:30
poole	8:31-8:40
lesson words	8:41-9:19
lesson puncuation of dialog	9:20-11:30
conversation	1:43-
9/22/89	
piano	8:30-9:23
test	9:25-9:30
conversation	9:31-11:05
school rules	11:07-11:30
9/25/89	
mob	8:40-8:45
conversation	8:46-10:58
9/2[illegible]	
decimals x decimals	8:55-11:00
lesson	1100-11:30
gournal	1:00-2:30

Elementary children are quite capable of tracking their use of time, as indicated by this excerpt. (Reprinted from NAMTA's *Implementing Montessori Education in the Public Sector*, 1990.)

Character Profile, Montessori School of Pullman (Pullman, WA)

GENERAL DEVELOPMENT

SENSE OF ORDER

CONCENTRATION

INDEPENDENCE

OBEDIENCE

INNER DISCIPLINE

SOCIALIZATION

GENERAL REMARKS

PHYSICAL DEVELOPMENT

Gross Motor Development

Fine Motor Development

Spacial Awareness

Eye-hand Coordination

Visual Discrimination

SOCIAL DEVELOPMENT

Interpersonal Relationships
- Children - younger
    - older
    - peers
- Adults - parents
    - strangers
    - teachers

Ability to express needs/feelings
- Children
- Adults

Responds to others needs/feelings

Ability to interact with a group
- Formal
- Informal

Problem solving skills

Role in classroom community

WORK HABITS

Self Directed

Works Independently

Handles Material With Care

Completes Cycle of Work

Respects Others Work

Attention Span

A fairly typical set of variables provides a good discussion base for a parent conference

Character Profile, Lake Country School (Minneapolis, MN)

This form is unusual in that it is based on Howard Gardner's Theory of Multiple Intelligences

LAKE COUNTRY SCHOOL STUDENT PROFILE
CHILDREN'S HOUSE

STUDENT: **TEACHERS:**

Age (years.months): **Date of Birth:** **School Year: 1996-97**

Intrapersonal: *self-confidence, responsibility, self-management, independence, ability to make choices, commitment to work, concentration...*

Interpersonal: *relationship with peers and adults, respect, solving relationship problems, collaborative group work, leadership, cooperation...*

Exploration of the Physical World: *geography, science, social studies, sensorial materials...*

Linguistic: *listening, speaking, writing, reading...*

Logical-mathematical: *mathematics, problem solving...*

Spatial: *visual arts, geometry, spatial reasoning...*

Bodily-kinesthetic: *small motor control, large motor control, coordination, physical education, and dance...*

Musical: *vocal, instrumental, cultures...*

Other Areas: *life beyond the classroom...*

This form is essentially based on Howard Gardner's theory of multiple intelligences.

Case Study

Case Study: Catherine

Catherine is an Anglo-American girl of middle-class background. Catherine was three years of age when she started the Montessori program in September 1988. This was Catherine's first year in school; however, the school experience was not totally foreign to her because she has an older sister who had started school the year before. Furthermore, Catherine's mother and father, both professional educators, reported having spent a portion of the summer of 1988 preparing their daughter for the Montessori program. As part of that preparation, the parents frequently drove by the school with Catherine to show her the school. Moreover, they often spoke to the child about the schooling experience. Thus, the parents facilitated the transition between home and school for the young girl.

Positive attitude toward school

When the school year began, Catherine seemed ambivalent about school. According to Catherine's father, the school schedule was very demanding for her initially, and it was not until December that the three-year-old girl began to handle the demands with ease. Catherine's father reported that by December his young daughter began to "look forward to going to school daily." The classroom observations lend support to this assessment of Catherine's shifting attitude toward school. For example, Catherine seemed tired and lacking in focus initially; however, as the school year progressed, she seemed more energetic and became more focused on work. By December she appeared very comfortable in the classroom. She looked happy, and exhibited curiosity and interest in work, which indicated that she was developing a positive attitude toward school.

Inner security and sense of order

According to the teacher, Catherine made important gains during the school year regarding her inner security and sense of order. At the beginning of the school year, Catherine was able to complete work previously presented to her by the instructor. While doing so, she handled the materials properly. As the year came to an end, the teacher reported that her young pupil displayed a more open attitude toward work, more spontaneous care of the environment, and greater organization during activities. The field notes support the instructor's view of Catherine's growth. By December Catherine seemed secure. This sense of security was evident as she interacted with adults and other children in the room. She handled materials adeptly and carefully. In brief, Catherine had internalized the rules of the classroom. She seemed to know what was expected of her and acted accordingly.

Pride in the physical environment

The information gleaned from the classroom observations, interview with the father, and the teacher's pre- and post-ratings suggest that Catherine began her schooling with a highly developed sense of pride in her physical environment. According to the teacher, Catherine completed her work and maintained good order consistently throughout the year. Catherine's father praised her organization at home, and as an example cited that "her room is always tidy." Analysis of the field notes reveals that the young girl was cautious and meticulous about her work. She handled materials purposefully and carefully, and always returned the materials to their proper place on the shelves.

Abiding curiosity

Catherine's curiosity expanded as she became more secure in the classroom environment. The field notes show her to be highly curious. She frequently sought new work. She worked intently and in an engaged and focused manner. She often took the initiative to request new lessons from the adults in

This very thorough case study was prepared by Ana Maria Villegas, using the set of variables she developed. As an outside researcher, Villegas did classroom observations and interviews with both teacher and parents, as well as reviewing the teacher's own record keeping, in order to compile the case study. (Reprinted from NAMTA's *Implementing Montessori Education in the Public Sector*, 1990.)

Case Study (continued)

the classroom. Usually transitions between activities were brief because her curiosity quickly attracted her to new work. In the teacher's view, Catherine was involved with the materials "to the point of interest." According to the father, Catherine's sense of curiosity is reinforced at home consistently. For example, her parents encourage her to ask questions and speculate about matters of importance to her. Thus, it seems that the teacher and parents both strengthened Catherine's sense of curiosity.

Habit of concentration

According to the teacher, Catherine made significant progress over the span of the school year regarding her habit of concentration. As the year began, the three-year-old demonstrated limited concentration and was never totally absorbed in her work. In contrast, by June of 1989, the instructor perceived her pupil to be nearly totally absorbed in and highly satisfied with her work. The observations confirmed this change. Initially, Catherine seemed somewhat distracted and not focused on work. As time progressed, she became more centered, increased her attention span, and rarely became distracted. This was evident during both individual work cycles and lessons with the teacher. Catherine's father noticed considerable progress in her ability to concentrate. In his own words, "she is more focused now than when she began school. Here at home, she attends to and completes tasks with greater ease."

Habits of initiative and persistence

In the instructor's view, Catherine began the school year lacking somewhat in initiative and persistence. Her attention seemed scattered, and she was dependent on adults. However, by June 1989, the teacher considered the young girl capable of following through with work and completing it satisfactorily. The field notes suggest that Catherine was more advanced in this area than the instructor assumed. Analysis of the field notes reveals that Catherine initiated most of her own activities without adult assistance. She frequently initiated contact with the teacher, but typically did so to advance an activity that she had chosen for herself or to get new lessons from the instructor. When seeking the teacher's attention, she was persistent. She knew how to situate herself near the instructor, make eye contact with her, and wait patiently until the adult responded to her. Unlike most other three-year-old children in the class, who generally gave up trying to get the teacher's attention if she did not notice them within a few seconds, Catherine was willing to wait her turn. Consequently, Catherine nearly always managed to engage the teacher when she sought to do so. Her persistence in seeking the instructor's attention gave her an academic edge over other children. For example, by November, Catherine had received several more lessons than any other three-year-old in the class.

Ability to decide

While initially hesitant to make decisions, Catherine soon expanded her ability in this area. In the teacher's view, she learned to make appropriate choices without adult direction. The field notes show that decision making was one of Catherine's major strengths. She wasted little time choosing work, as was evident in the brief transition periods between work cycles. Additionally, she made her choices independent of adults or other children in the room. Catherine's father saw major progress over the span of the year regarding her ability to make decisions. As he explained, before Catherine began the Montessori program she was given many opportunities to make decisions at home, but was often hesitant to do so. By the end of her first year in the program, Catherine was able to make decisions on her own with greater ease. Her father attributed this change to the girl's Montessori experience.

Case Study (continued)

Sense of independence and self-confidence

Catherine's father considers her to be highly independent and self-confident. This view is shared by Catherine's teacher who describes her as being happy, interested, involved, and able to work alone. The field notes substantiate the claims made by both the father and teacher. For example, Catherine rarely hesitated when approaching older students whom she did not know. At times she joined group lessons given in Spanish, even though she did not speak the language. She was brave, confident, and independent.

Self-discipline

The instructor considered Catherine to be consistently self-disciplined. In her view, the young girl kept up with work, moved at her own pace, and got along well with her peers. The observational data support the teacher's impression. Catherine monitored her own work. Her behavior was purposeful and controlled. She seemed highly focused and in harmony with the group.

Sense of responsibility to others

Both Catherine's father and teacher concurred that the young pupil has a fairly well-developed sense of responsibility given her age, but neither noticed significant changes in this area over the school year. At home, Catherine was helpful to her parents and sister. In school, she performed classroom jobs. The field notes show that Catherine was highly responsible for her own behavior but took limited interest in the work of others. However, she acted in socially appropriate ways. When joining groups she was quiet and polite. When group tasks demanded it, she cooperated with others.

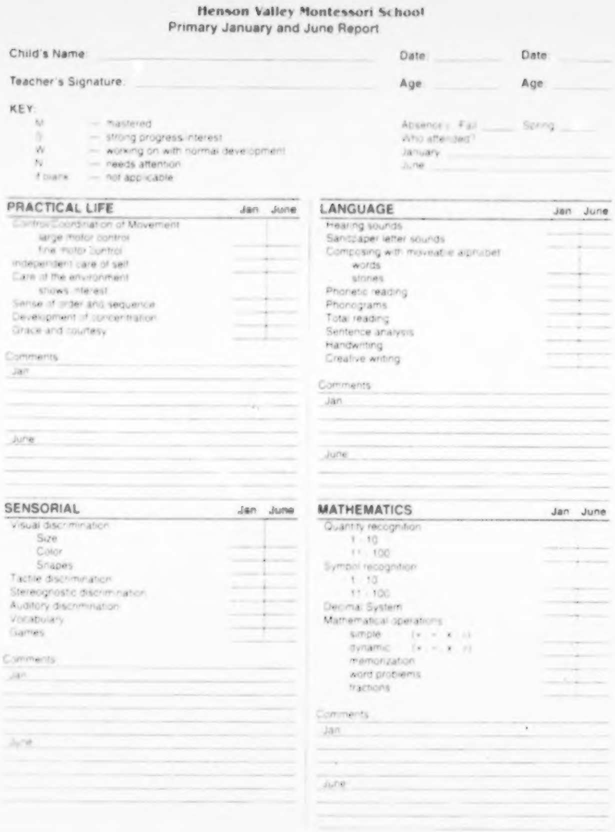
Summary

The data presented in this case study show that Catherine expanded her foundation for learning in significant ways during the 1988-89 school year. The young student improved her attitude toward school as she became accustomed to the demands of the school schedule. Her inner sense of security increased as she became knowledgeable of the rules of the classroom. This knowledge augmented her sense of order and fostered her curiosity. With time, Catherine enhanced her abilities to concentrate on work and to make decisions. Additionally, she became more persistent and took more initiative. Growth in these areas strengthened Catherine's sense of independence and self-confidence.

The data showed no major changes in Catherine's sense of pride in the physical environment, self-discipline, and sense of responsibility toward others. However, both the father and teacher reported that she had begun the school year already highly developed in these three areas.

Catherine is an example of a highly successful young student. In her case, one can see the profound impact of the home-school link. Specifically the ten basic attitudes toward learning and school valued by the Montessori staff were valued by Catherine's parents as well. This close match in values led to similar socialization experiences in the home and school contexts, and supported her academic development throughout the school year.

These checklists, for the preschool and lower elementary levels, provide quick reference but are somewhat limited in observational or anecdotal information.



Henson Valley Montessori School
Primary January and June Report

Child's Name: ______ Date: ______ Date: ______

Teacher's Signature: ______ Age: ______ Age: ______

KEY:
M — mastered
S — strong progress/interest
W — working on with normal development
N — needs attention
If blank — not applicable

Absences: Fall ______ Spring ______
Who attended?
January ______
June ______

PRACTICAL LIFE	Jan	June
Control/Coordination of Movement		
large motor control		
fine motor control		
Independent care of self		
Care of the environment		
shows interest		
Sense of order and sequence		
Development of concentration		
Grace and courtesy		

Comments
Jan
June

LANGUAGE	Jan	June
Hearing sounds		
Sandpaper letter sounds		
Composing with moveable alphabet		
words		
stories		
Phonetic reading		
Phonograms		
Total reading		
Sentence analysis		
Handwriting		
Creative writing		

Comments
Jan
June

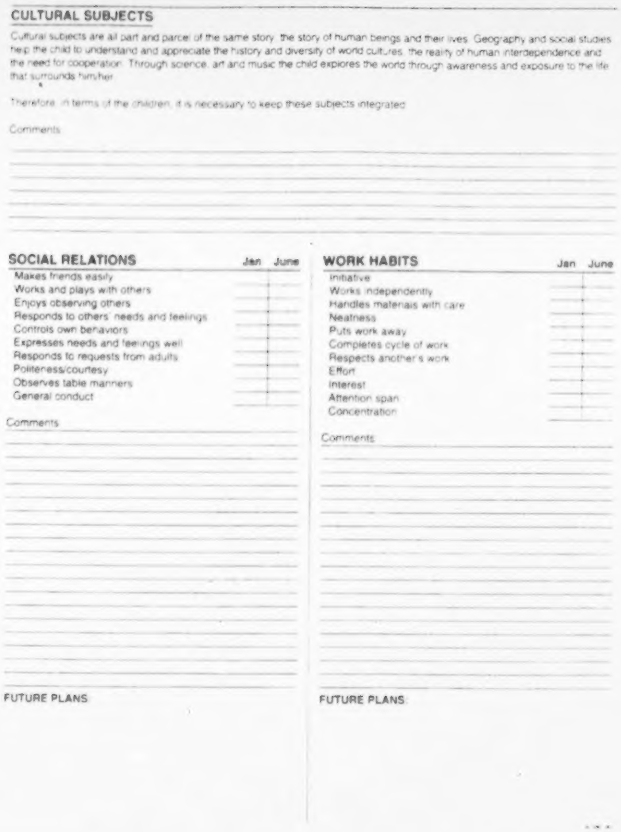
SENSORIAL	Jan	June
Visual discrimination		
Size		
Color		
Shapes		
Tactile discrimination		
Stereognostic discrimination		
Auditory discrimination		
Vocabulary		
Games		

Comments
Jan
June

MATHEMATICS	Jan	June
Quantity recognition		
1 - 10		
11 - 100		
Symbol recognition		
1 - 10		
11 - 100		
Decimal System		
Mathematical operations		
simple (+ - × ÷)		
dynamic (+ - × ÷)		
memorization		
word problems		
fractions		

Comments
Jan
June

Brief Mastery Checklists, Henson Valley Montessori School (Temple Hills, MD)



CULTURAL SUBJECTS

Cultural subjects are all part and parcel of the same story: the story of human beings and their lives. Geography and social studies help the child to understand and appreciate the history and diversity of world cultures, the reality of human interdependence and the need for cooperation. Through science, art and music the child explores the world through awareness and exposure to the life that surrounds him/her.

Therefore, in terms of the children, it is necessary to keep these subjects integrated.

Comments

SOCIAL RELATIONS	Jan	June
Makes friends easily		
Works and plays with others		
Enjoys observing others		
Responds to others' needs and feelings		
Controls own behaviors		
Expresses needs and feelings well		
Responds to requests from adults		
Politeness/courtesy		
Observes table manners		
General conduct		

Comments

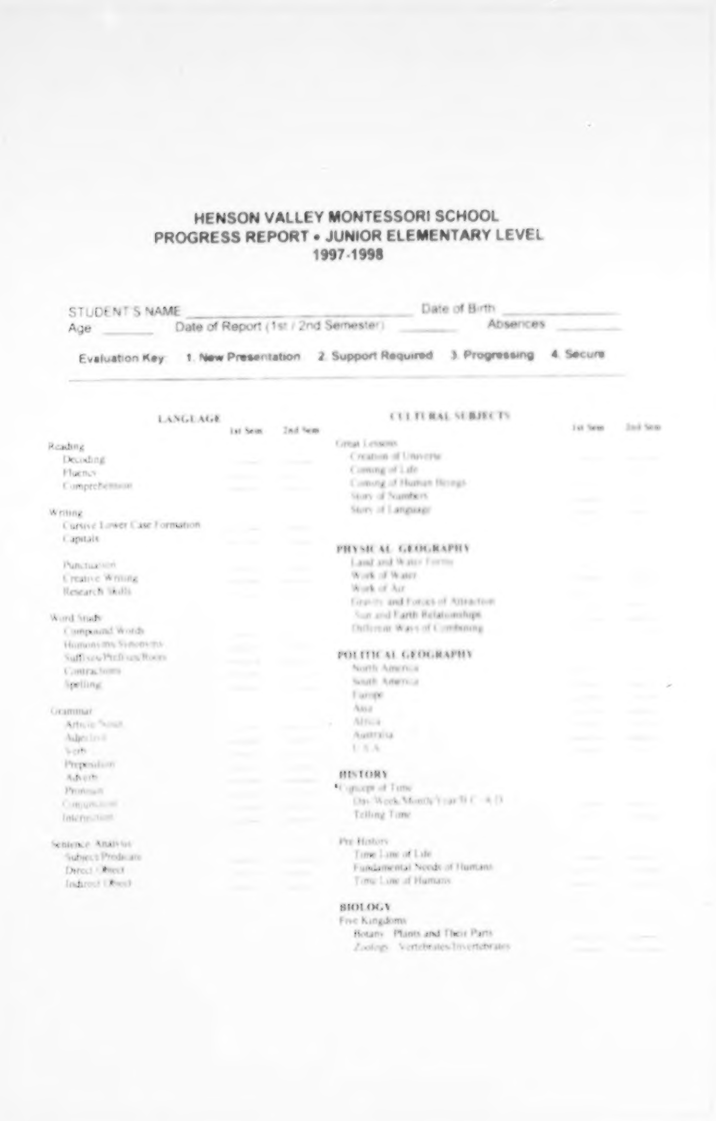
FUTURE PLANS:

WORK HABITS	Jan	June
Initiative		
Works independently		
Handles materials with care		
Neatness		
Puts work away		
Completes cycle of work		
Respects another's work		
Effort		
Interest		
Attention span		
Concentration		

Comments

FUTURE PLANS:

Brief Mastery Checklists, Henson Valley Montessori School (continued)



HENSON VALLEY MONTESSORI SCHOOL
PROGRESS REPORT • JUNIOR ELEMENTARY LEVEL
1997-1998

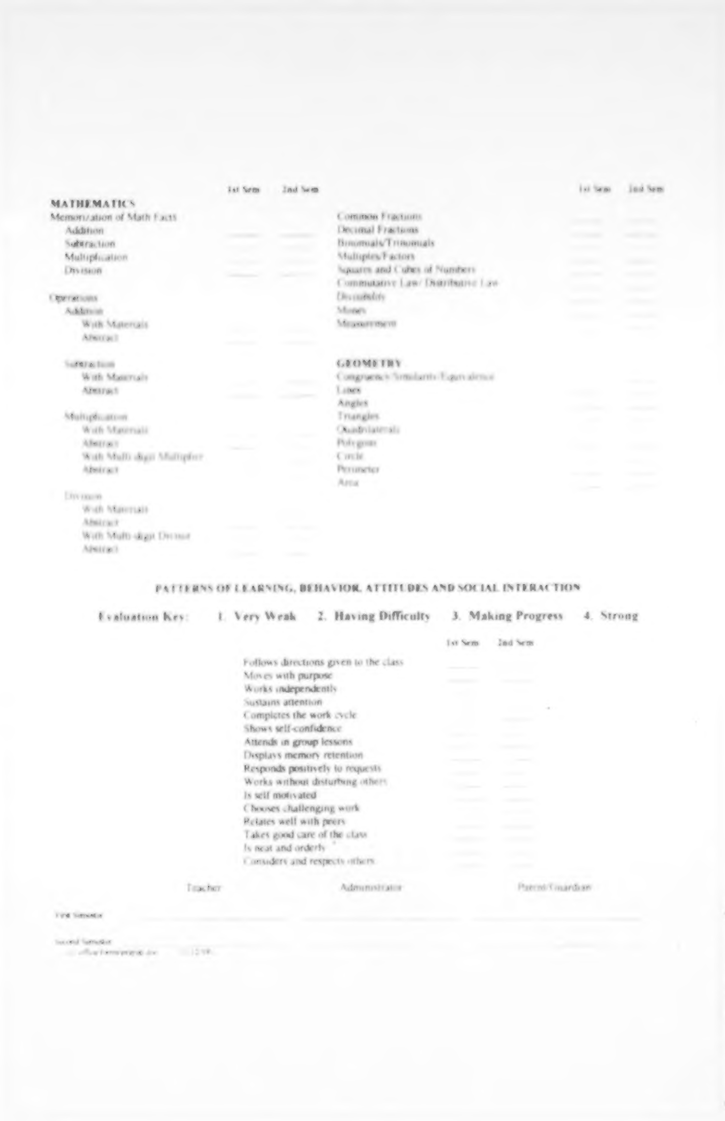
STUDENT'S NAME ______________________ Date of Birth ______________

Age ______ Date of Report (1st / 2nd Semester) ______ Absences ______

Evaluation Key: 1. New Presentation 2. Support Required 3. Progressing 4. Secure

LANGUAGE	1st Sem	2nd Sem
Reading		
Decoding		
Fluency		
Comprehension		
Writing		
Cursive Lower Case Formation		
Capitals		
Punctuation		
Creative Writing		
Research Skills		
Word Study		
Compound Words		
Homonyms/Synonyms		
Suffixes/Prefixes/Roots		
Contractions		
Spelling		
Grammar		
Article/Noun		
Adjective		
Verb		
Preposition		
Adverb		
Pronoun		
Conjunction		
Interjection		
Sentence Analysis		
Subject/Predicate		
Direct Object		
Indirect Object		

CULTURAL SUBJECTS	1st Sem	2nd Sem
Great Lessons		
Creation of Universe		
Coming of Life		
Coming of Human Beings		
Story of Numbers		
Story of Language		
PHYSICAL GEOGRAPHY		
Land and Water Forms		
Work of Water		
Work of Air		
Gravity and Forces of Attraction		
Sun and Earth Relationships		
Different Ways of Combining		
POLITICAL GEOGRAPHY		
North America		
South America		
Europe		
Asia		
Africa		
Australia		
U.S.A.		
HISTORY		
*Concept of Time		
Day/Week/Month/Year/B.C.-A.D.		
Telling Time		
Pre History		
Time Line of Life		
Fundamental Needs of Humans		
Time Line of Humans		
BIOLOGY		
Five Kingdoms		
Botany: Plants and Their Parts		
Zoology: Vertebrates/Invertebrates		



MATHEMATICS	1st Sem	2nd Sem
Memorization of Math Facts		
Addition		
Subtraction		
Multiplication		
Division		
Operations		
Addition		
With Materials		
Abstract		
Subtraction		
With Materials		
Abstract		
Multiplication		
With Materials		
Abstract		
With Multi-digit Multiplier		
Abstract		
Division		
With Materials		
Abstract		
With Multi-digit Divisor		
Abstract		

	1st Sem	2nd Sem
Common Fractions		
Decimal Fractions		
Binomials/Trinomials		
Multiples/Factors		
Squares and Cubes of Numbers		
Commutative Law/ Distributive Law		
Divisibility		
Money		
Measurement		
GEOMETRY		
Congruency/Similarity/Equivalence		
Lines		
Angles		
Triangles		
Quadrilaterals		
Polygons		
Circle		
Perimeter		
Area		

PATTERNS OF LEARNING, BEHAVIOR, ATTITUDES AND SOCIAL INTERACTION

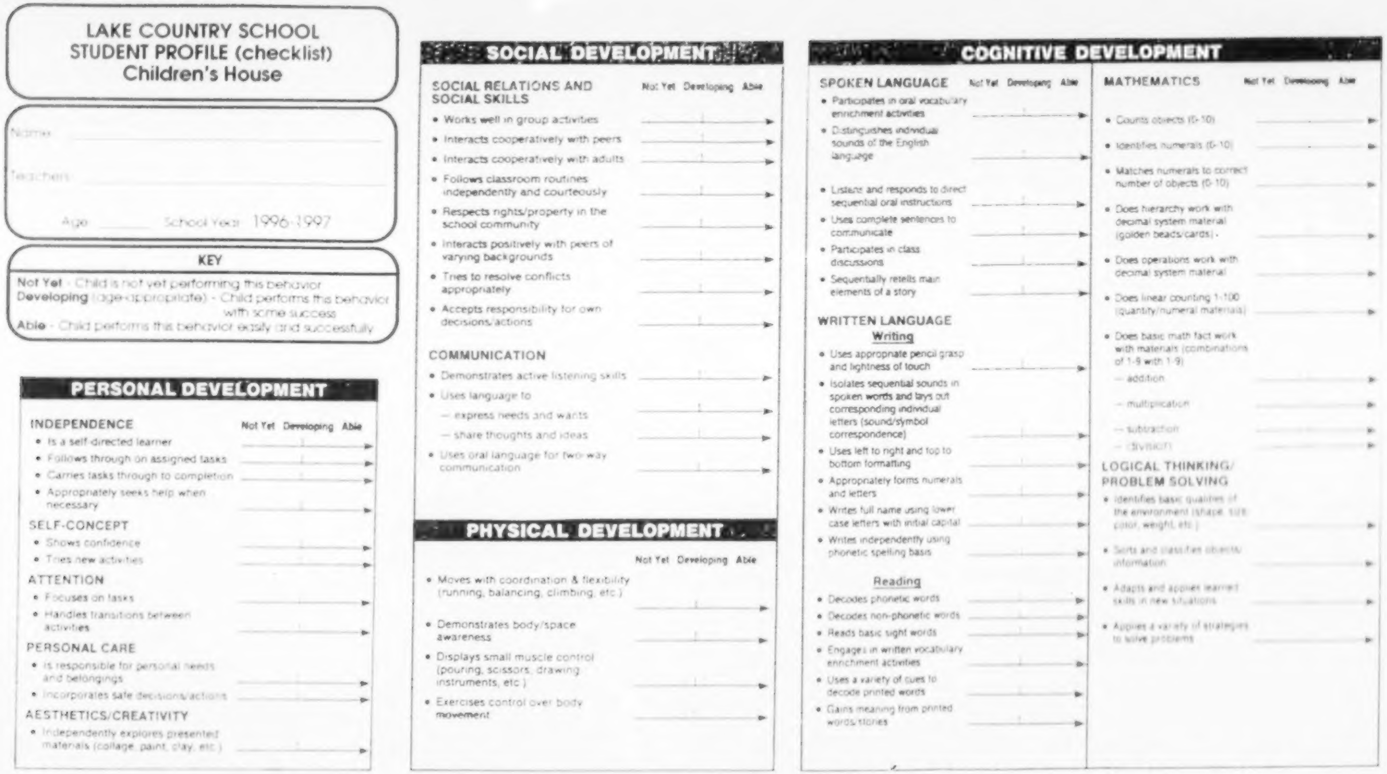
Evaluation Key: 1. Very Weak 2. Having Difficulty 3. Making Progress 4. Strong

	1st Sem	2nd Sem
Follows directions given to the class		
Moves with purpose		
Works independently		
Sustains attention		
Completes the work cycle		
Shows self-confidence		
Attends in group lessons		
Displays memory retention		
Responds positively to requests		
Works without disturbing others		
Is self motivated		
Chooses challenging work		
Relates well with peers		
Takes good care of the class		
Is neat and orderly		
Considers and respects others		

	Teacher	Administrator	Parent/Guardian
First Semester			
Second Semester			

BEST COPY AVAILABLE

Brief Mastery Checklist, Lake Country School (Minneapolis, MN)



LAKE COUNTRY SCHOOL
STUDENT PROFILE (checklist)
Children's House

Name: __________

Teachers: __________

Age _____ School Year 1996-1997

KEY

Not Yet - Child is not yet performing this behavior
Developing (age-appropriate) - Child performs this behavior with some success
Able - Child performs this behavior easily and successfully

PERSONAL DEVELOPMENT

Not Yet Developing Able

INDEPENDENCE
- Is a self-directed learner
- Follows through on assigned tasks
- Carries tasks through to completion
- Appropriately seeks help when necessary

SELF-CONCEPT
- Shows confidence
- Tries new activities

ATTENTION
- Focuses on tasks
- Handles transitions between activities

PERSONAL CARE
- Is responsible for personal needs and belongings
- Incorporates safe decisions/actions

AESTHETICS/CREATIVITY
- Independently explores presented materials (collage, paint, clay, etc.)

SOCIAL DEVELOPMENT

SOCIAL RELATIONS AND SOCIAL SKILLS — Not Yet Developing Able
- Works well in group activities
- Interacts cooperatively with peers
- Interacts cooperatively with adults
- Follows classroom routines independently and courteously
- Respects rights/property in the school community
- Interacts positively with peers of varying backgrounds
- Tries to resolve conflicts appropriately
- Accepts responsibility for own decisions/actions

COMMUNICATION
- Demonstrates active listening skills
- Uses language to
  - express needs and wants
  - share thoughts and ideas
- Uses oral language for two-way communication

PHYSICAL DEVELOPMENT

Not Yet Developing Able
- Moves with coordination & flexibility (running, balancing, climbing, etc.)
- Demonstrates body/space awareness
- Displays small muscle control (pouring, scissors, drawing instruments, etc.)
- Exercises control over body movement

COGNITIVE DEVELOPMENT

SPOKEN LANGUAGE — Not Yet Developing Able
- Participates in oral vocabulary enrichment activities
- Distinguishes individual sounds of the English language
- Listens and responds to direct sequential oral instructions
- Uses complete sentences to communicate
- Participates in class discussions
- Sequentially retells main elements of a story

WRITTEN LANGUAGE

Writing
- Uses appropriate pencil grasp and lightness of touch
- Isolates sequential sounds in spoken words and lays out corresponding individual letters (sound/symbol correspondence)
- Uses left to right and top to bottom formatting
- Appropriately forms numerals and letters
- Writes full name using lower case letters with initial capital
- Writes independently using phonetic spelling basis

Reading
- Decodes phonetic words
- Decodes non-phonetic words
- Reads basic sight words
- Engages in written vocabulary enrichment activities
- Uses a variety of cues to decode printed words
- Gains meaning from printed words/stories

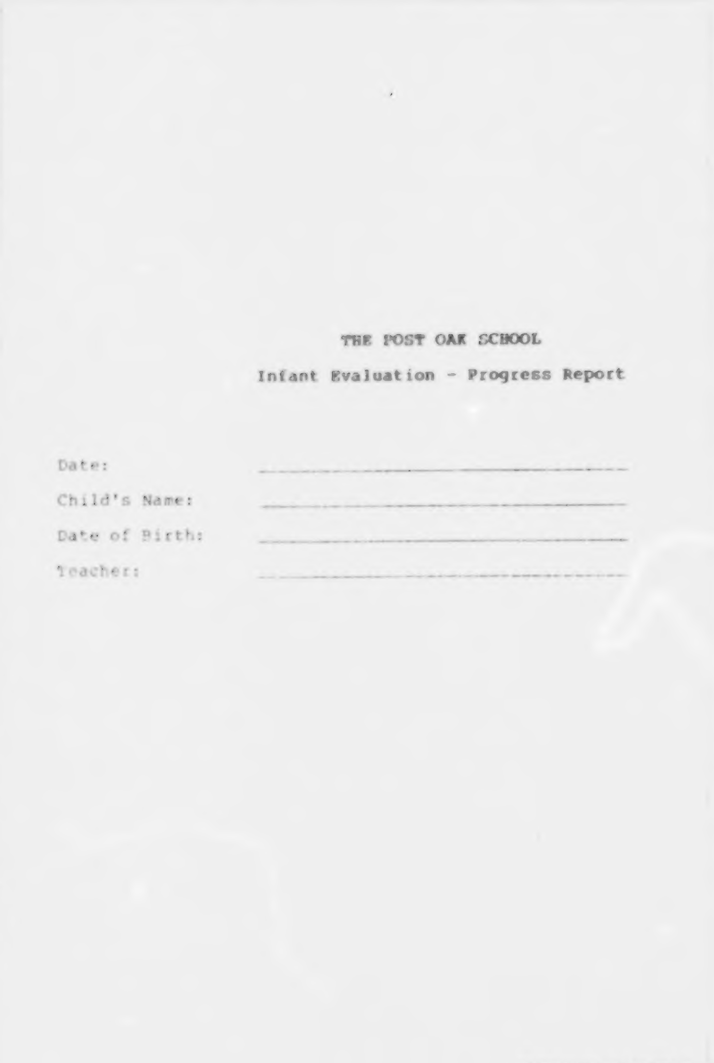
MATHEMATICS — Not Yet Developing Able
- Counts objects (0-10)
- Identifies numerals (0-10)
- Matches numerals to correct number of objects (0-10)
- Does hierarchy work with decimal system material (golden beads/cards)
- Does operations work with decimal system material
- Does linear counting 1-100 (quantity/numeral materials)
- Does basic math fact work with materials (combinations of 1-9 with 1-9)
  - addition
  - multiplication
  - subtraction
  - (division)

LOGICAL THINKING/ PROBLEM SOLVING
- Identifies basic qualities of the environment (shape, size, color, weight, etc.)
- Sorts and classifies objects/information
- Adapts and applies learned skills in new situations
- Applies a variety of strategies to solve problems

Quick-reference checklist for the preschool level.
Again, lack of space for anecdotal information may be a drawback.

Descriptive Progress Reports, The Post Oak School (Bellaire, TX)

Post Oak's forms allow for narrative comments while demonstrating the developmental continuum and its impact on record keeping. Space for specialty teachers' reports is included as appropriate



THE POST OAK SCHOOL

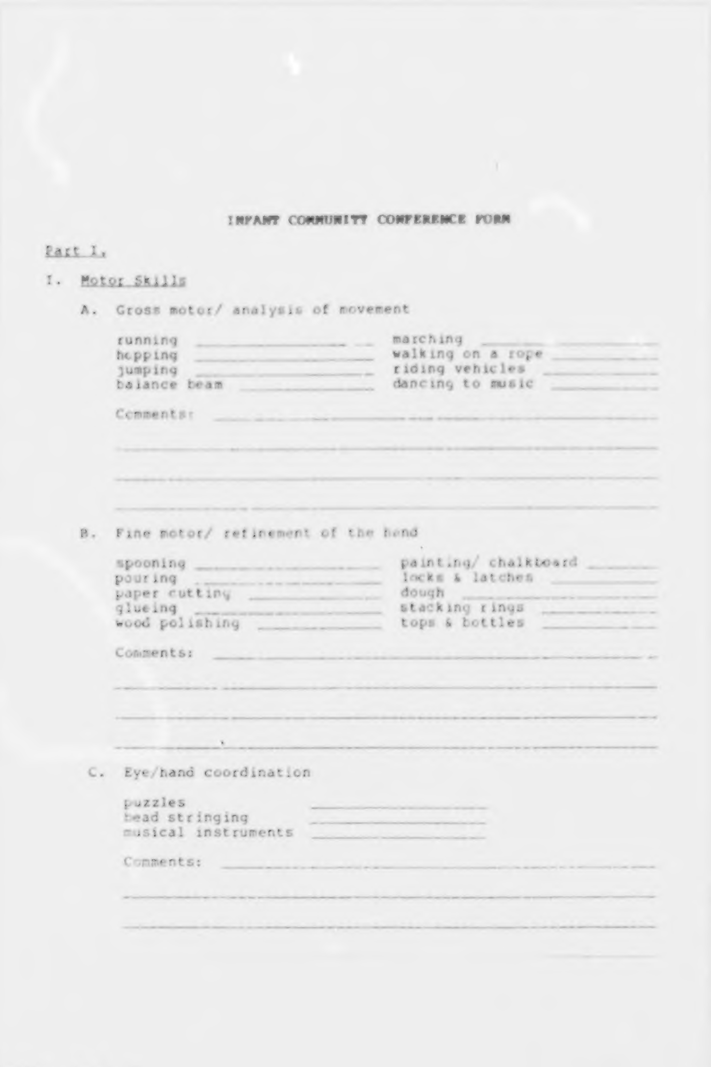
Infant Evaluation - Progress Report

Date: ____________________

Child's Name: ____________________

Date of Birth: ____________________

Teacher: ____________________



INFANT COMMUNITY CONFERENCE FORM

Part I.

I. Motor Skills

A. Gross motor/ analysis of movement

running ____________ marching ____________
hopping ____________ walking on a rope ____________
jumping ____________ riding vehicles ____________
balance beam ____________ dancing to music ____________

Comments: ____________________

B. Fine motor/ refinement of the hand

spooning ____________ painting/ chalkboard ____________
pouring ____________ locks & latches ____________
paper cutting ____________ dough ____________
glueing ____________ stacking rings ____________
wood polishing ____________ tops & bottles ____________

Comments: ____________________

C. Eye/hand coordination

puzzles ____________
bead stringing ____________
musical instruments ____________

Comments: ____________________

BEST COPY AVAILABLE

Descriptive Progress Reports, The Post Oak School (continued)

(infant report continued)

II. Practical Life

A. Care of Self

undressing/ dressing - shoes, socks, underpants, etc. ______

handwashing ______
hair brushing ______
eating ______

Comments: ______

B. Care of the Environment

dusting ______
sweeping & mopping ______
furniture polishing ______
flower arranging ______
window washing ______
plant watering ______
table setting ______

Comments: ______

III. Language

A. Vocabulary development

books ______
language cards ______
naming objects ______
music - singing & listening ______

B. Ability to express needs, verbally and non-verbally

Comments: ______

Part II.

I. Social Development

A. Relationships to others - children, adults, new people (classroom, playground, group lesson)

Comments: ______

B. Initial adjustment to classroom ______

II. Emotional Development

flexibility ______
cooperativeness ______
independence/ initiative ______
frustration tolerance ______
acceptance of routines & limits ______

Comments: ______

Descriptive Progress Reports, The Post Oak School (continued)

Part III.

Physical Habits

sleeping ____________
eating ____________
toilet training ____________

Comments: ____________________________________

____

____

____

____

____

Part IV.

A. Areas of Possible Concern: ____________________

____

____

B. Suggestions for Home: ____________________

____

____

____

532

(end of infant report, beginning of preschool report)

THE POST OAK SCHOOL

PROGRESS REPORT
PRIMARY
19__ / 19__

Child: ____________________

Current Age: ____________________

Teacher: ____________________

Date of Report: ____________________

Days Absent: ________ **of** __________

533

(preschool report, continued)

V = Very definitely and regularly
G = Generally
N = Not consistently

WORK HABITS AND ATTITUDES

Self-Motivation:

Shows active interest in classroom activities ____
Shows initiative and self - motivation ____
Chooses challenging activities, unassisted ____
Works with maximum effort ____
Enjoys helping others and sharing knowledge ____
Cares for materials and environment ____
Accepts adult direction to activities ____
Sets realistic goals for self ____
Makes reasonable choices ____

Organizational Skills:

Able to organize a task by self ____
Uses time constructively ____
Follows a logical sequence in a task ____
Is attentive to detail ____
Completes one task before starting another ____
Able to seek help when necessary ____

Concentration:

Shows age appropriate attention span ____
Able to complete complex project by self ____
Perseveres / explores alternative solutions ____
Able to follow simple directions ____
Able to follow complex directions ____
Listens attentively ____

SOCIAL - EMOTIONAL DEVELOPMENT

Self - Esteem:

Displays a happy, positive attitude ____
Is secure and self - confident ____
Accepts responsibility for self ____
Stands up for self ____

Self - Control:

Maintains appropriate behavior without external aid ____
Able to wait turn ____
Able to give attention in a group setting ____

Social Skills:

Works and plays cooperatively with peers ____
Respects needs of others ____
Practices rules of social etiquette ____
Reacts to social conflicts in a constructive manner ____
____
Openly relates to adults ____
Openly participates in group ____
Able to share ____

Independence:

Secure with own skills ____
Acts for own satisfaction ____

Comments

____
____
____

Descriptive Progress Reports, The Post Oak School (continued)

Geography:

____
____
____

Art:

____
____
____

Music:

____
____
____

Science:

____
____
____

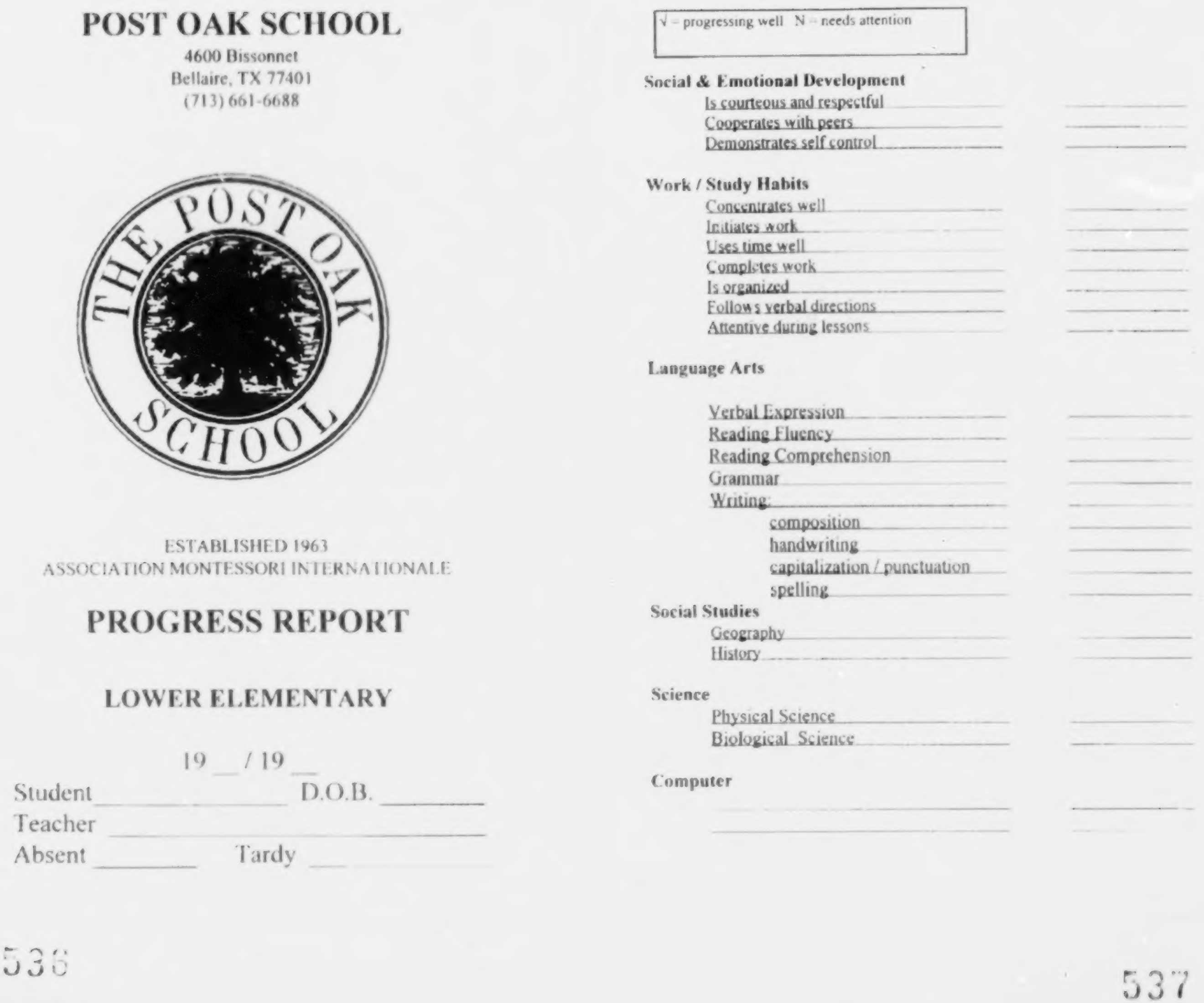
Comments:

____
____
____
____
____
____
____
____
____

____
Signature of Teacher

Descriptive Progress Reports, The Post Oak School (continued)

(lower elementary report)



POST OAK SCHOOL

4600 Bissonnet
Bellaire, TX 77401
(713) 661-6688

THE POST OAK SCHOOL

ESTABLISHED 1963
ASSOCIATION MONTESSORI INTERNATIONALE

PROGRESS REPORT

LOWER ELEMENTARY

19 __ / 19 __

Student ______________ D.O.B. ________

Teacher ______________________

Absent ________ Tardy ________

536

√ = progressing well N = needs attention

Social & Emotional Development
- Is courteous and respectful ________ ________
- Cooperates with peers ________ ________
- Demonstrates self control ________ ________

Work / Study Habits
- Concentrates well ________ ________
- Initiates work ________ ________
- Uses time well ________ ________
- Completes work ________ ________
- Is organized ________ ________
- Follows verbal directions ________ ________
- Attentive during lessons ________ ________

Language Arts
- Verbal Expression ________ ________
- Reading Fluency ________ ________
- Reading Comprehension ________ ________
- Grammar ________ ________
- Writing: ________ ________
  - composition ________ ________
  - handwriting ________ ________
  - capitalization / punctuation ________ ________
  - spelling ________ ________

Social Studies
- Geography ________ ________
- History ________ ________

Science
- Physical Science ________ ________
- Biological Science ________ ________

Computer

________________ ________

________________ ________

537

Mathematics

- Numeration and Place Value
- Basic Operations & Math Facts
  - Addition
  - Subtraction
  - Multiplication
  - Division
- Simple Fractions
- Decimal Fractions
- Squaring
- Geometry

Comments

(lower elementary report, continued)

Descriptive Progress Reports, The Post Oak School (continued)

√ = progressing well N = needs attention

Foreign Lanuage

- Spanish

Comments

Signature **Date**

Fine Arts

- Art
- Music
- Creative Expression

Comments

Signature **Date**

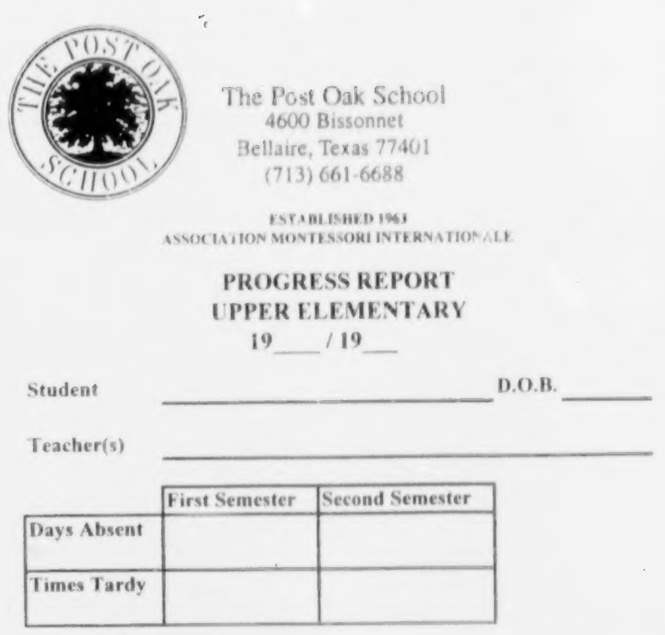
Physical Fitness

- Gross Motor Coordination
- Endurance
- Cooperation, Teamwork, Attitude

Comments

Signature **Date**

Descriptive Progress Reports, The Post Oak School (continued)



The Post Oak School
4600 Bissonnet
Bellaire, Texas 77401
(713) 661-6688

ESTABLISHED 1963
ASSOCIATION MONTESSORI INTERNATIONALE

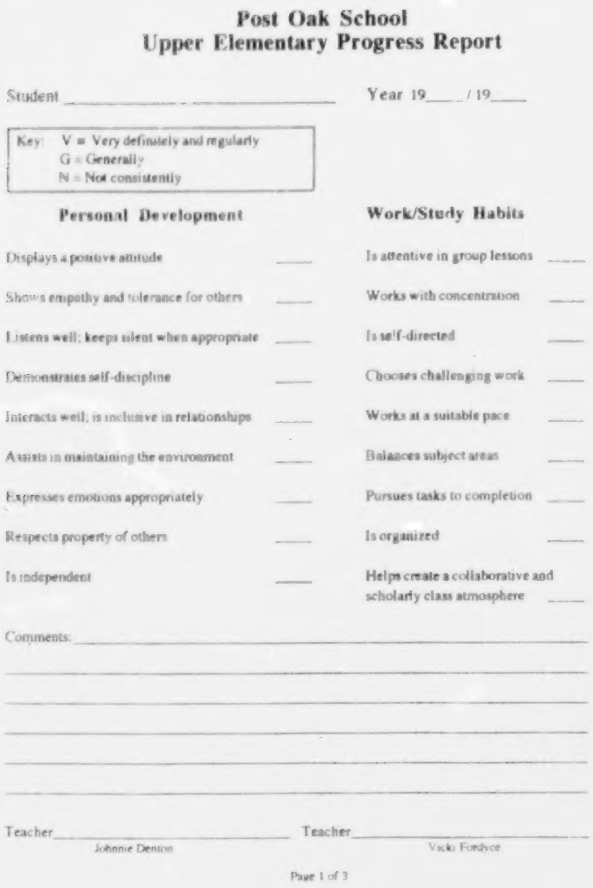
PROGRESS REPORT
UPPER ELEMENTARY
19____ / 19___

Student ____________________________ **D.O.B.** ________

Teacher(s) ____________________________________

	First Semester	Second Semester
Days Absent		
Times Tardy		

(upper elementary report)



Post Oak School
Upper Elementary Progress Report

Student ____________________________ Year 19____ / 19____

Key: V = Very definitely and regularly
G = Generally
N = Not consistently

Personal Development		Work/Study Habits	
Displays a positive attitude	____	Is attentive in group lessons	____
Shows empathy and tolerance for others	____	Works with concentration	____
Listens well; keeps silent when appropriate	____	Is self-directed	____
Demonstrates self-discipline	____	Chooses challenging work	____
Interacts well; is inclusive in relationships	____	Works at a suitable pace	____
Assists in maintaining the environment	____	Balances subject areas	____
Expresses emotions appropriately	____	Pursues tasks to completion	____
Respects property of others	____	Is organized	____
Is independent	____	Helps create a collaborative and scholarly class atmosphere	____

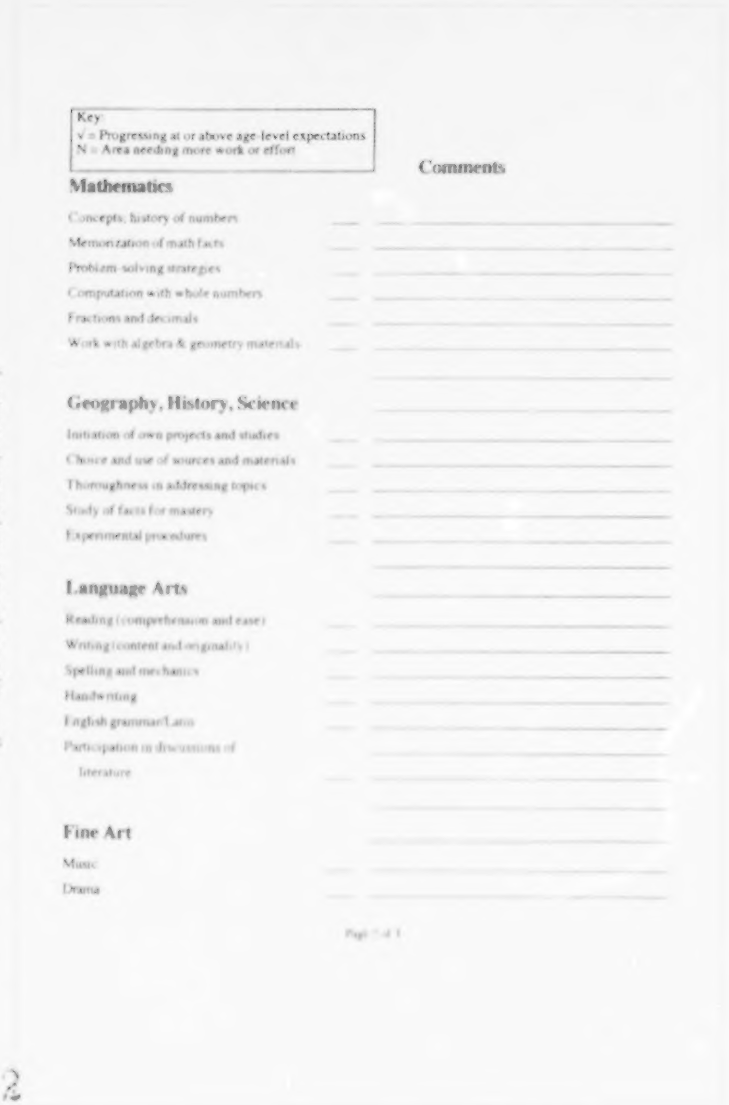
Comments: ____

Teacher ____________________ Teacher ____________________
Johnnie Denton Vicki Fordyce

Page 1 of 3

Descriptive Progress Reports, The Post Oak School (continued)

(upper elementary report, continued)



Key:
√ = Progressing at or above age-level expectations
N = Area needing more work or effort

Comments

Mathematics

Concepts; history of numbers ___ ______________
Memorization of math facts ___ ______________
Problem-solving strategies ___ ______________
Computation with whole numbers ___ ______________
Fractions and decimals ___ ______________
Work with algebra & geometry materials ___ ______________

Geography, History, Science

Initiation of own projects and studies ___ ______________
Choice and use of sources and materials ___ ______________
Thoroughness in addressing topics ___ ______________
Study of facts for mastery ___ ______________
Experimental procedures ___ ______________

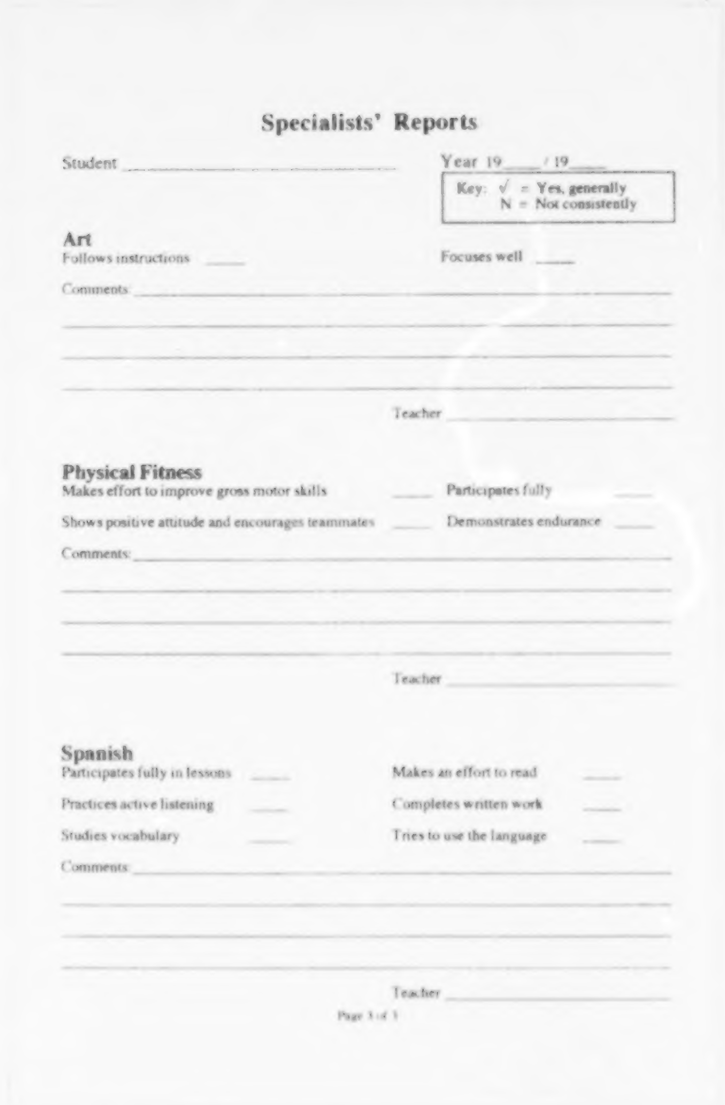
Language Arts

Reading (comprehension and ease) ___ ______________
Writing (content and originality) ___ ______________
Spelling and mechanics ___ ______________
Handwriting ___ ______________
English grammar/Latin ___ ______________
Participation in discussions of literature ___ ______________

Fine Art

Music ___ ______________
Drama ___ ______________

Page 2 of 3



Specialists' Reports

Student ______________ Year 19___/19___

Key: √ = Yes, generally
N = Not consistently

Art

Follows instructions ___ Focuses well ___

Comments: ______________

Teacher ______________

Physical Fitness

Makes effort to improve gross motor skills ___ Participates fully ___

Shows positive attitude and encourages teammates ___ Demonstrates endurance ___

Comments: ______________

Teacher ______________

Spanish

Participates fully in lessons ___ Makes an effort to read ___

Practices active listening ___ Completes written work ___

Studies vocabulary ___ Tries to use the language ___

Comments: ______________

Teacher ______________

Page 3 of 3

Descriptive Progress Reports, The Post Oak School (continued)

THE POST OAK SCHOOL STUDENT EVALUATION - HUMANITIES Date ____________
Name ____________
Grade ____________

Usually……Often……Sometimes……Rarely

- Contributes to class discussions in a meaningful way
- Consistently recognizes parts of speech
- Uses grammar correctly in written work
- Distinguishes between plurals and possessives in written work
- Comes prepared to class
- Completes reading assignments on time
- Develops thoughtful evaluative and interpretative questions
- Supports his/her responses in seminar with evidence from the assigned reading
- Contributes meaningfully to seminar discussions
- Respects the opinions of peers in discussions
- Uses a variety of resources when preparing a written assignment
- Maps or outlines ideas before beginning a paper
- Composes creative/original titles
- Revises written work
- Proofreads work for capitalization, punctuation spelling and grammar
- Produces a properly documented work cited page
- Formats papers within proper guidelines
- Test Averages: ____________

Comments

THE POST OAK SCHOOL STUDENT EVALUATION - GENERAL Date ____________
Name ____________
Grade ____________

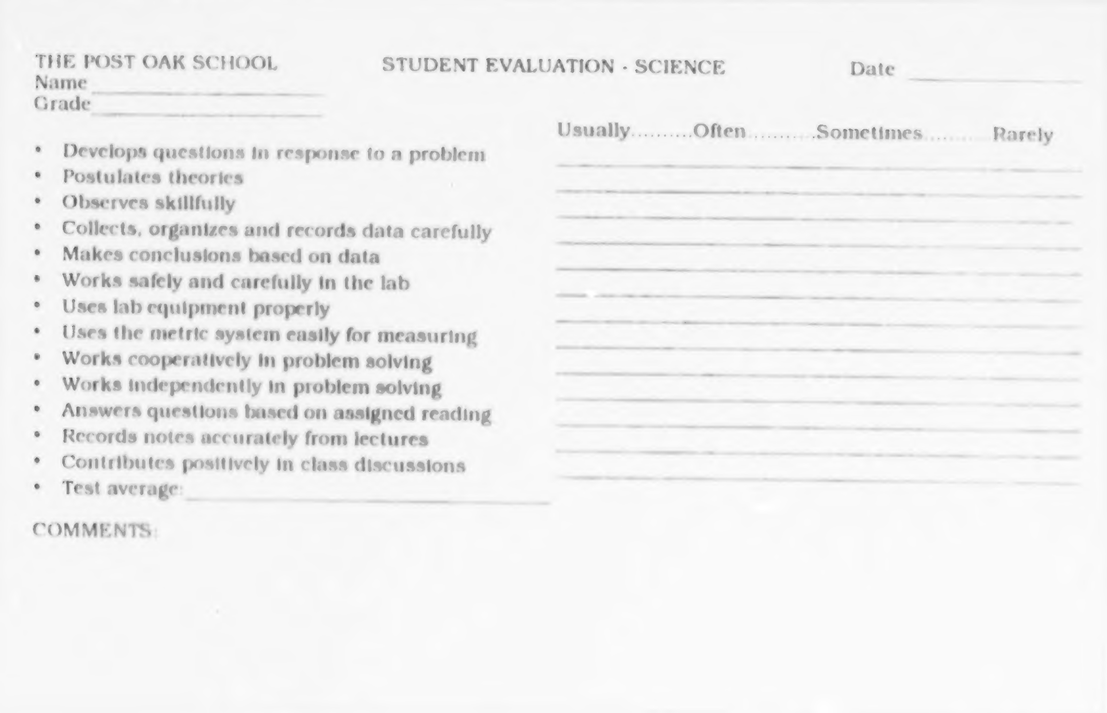
Usually……….Often……….Sometimes……….Rarely

- Comes prepared for class
- Answers questions based on assigned reading
- Records notes completely and accurately from assigned reading
- Records notes completely and accurately from lectures
- Produces polished written work
- Completes homework when due
- Schedules time to allow for long term projects and assignments
- Is respectful and courteous to others
- Uses time wisely in class
- Contributes positively in class discussion
- Participates in group activities
- Handles the materials in the class with care
- Strives to be organized

COMMENTS:

(adolescent report)

Descriptive Progress Reports, The Post Oak School (continued)



THE POST OAK SCHOOL
Name ______________________
Grade ______________________

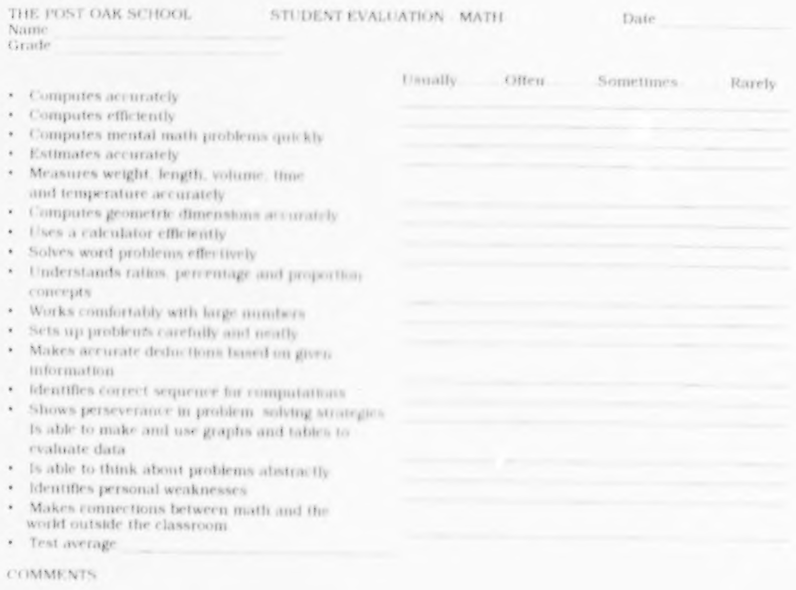
STUDENT EVALUATION - SCIENCE

Date ______________

Usually..........Often..........Sometimes..........Rarely

- Develops questions in response to a problem
- Postulates theories
- Observes skillfully
- Collects, organizes and records data carefully
- Makes conclusions based on data
- Works safely and carefully in the lab
- Uses lab equipment properly
- Uses the metric system easily for measuring
- Works cooperatively in problem solving
- Works independently in problem solving
- Answers questions based on assigned reading
- Records notes accurately from lectures
- Contributes positively in class discussions
- Test average: ______________________

COMMENTS:



THE POST OAK SCHOOL
Name ______________________
Grade ______________________

STUDENT EVALUATION - MATH

Date ______________

Usually..........Often..........Sometimes..........Rarely

- Computes accurately
- Computes efficiently
- Computes mental math problems quickly
- Estimates accurately
- Measures weight, length, volume, time and temperature accurately
- Computes geometric dimensions accurately
- Uses a calculator efficiently
- Solves word problems effectively
- Understands ratios, percentage and proportion concepts
- Works comfortably with large numbers
- Sets up problems carefully and neatly
- Makes accurate deductions based on given information
- Identifies correct sequence for computations
- Shows perseverance in problem solving strategies Is able to make and use graphs and tables to evaluate data
- Is able to think about problems abstractly
- Identifies personal weaknesses
- Makes connections between math and the world outside the classroom
- Test average ______________________

COMMENTS

(adolescent report, continued)

Descriptive Progress Reports, The Post Oak School (continued)

(adolescent report, continued)

Specialists' Reports

Student ____________________

Year 19__/19__

Key: √ = Yes, generally
N = Not consistently

Art

Follows instructions ____
Focuses well ____

Comments: ________________________________

Physical Fitness

Makes effort to improve gross motor skills ____
Participates fully ____
Shows positive attitude & encourages others ____
Demonstrates endurance ____

Comments: ________________________________

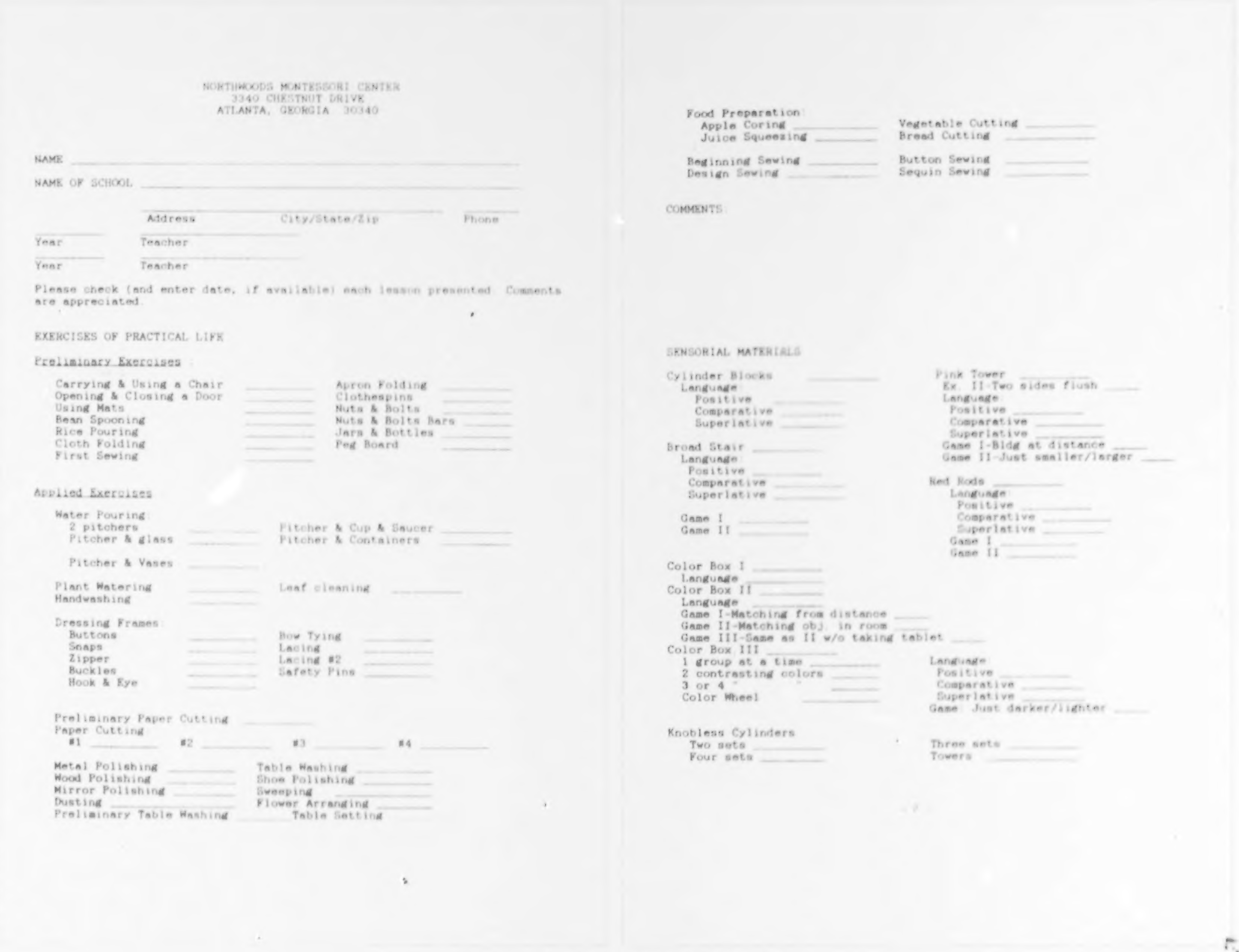
Spanish

Participates fully in lessons ____
Practices active listening ____
Studies vocabulary ____
Makes an effort to read ____
Completes written word ____
Tries to use the language ____

Comments: ________________________________

Expanded Mastery Checklists, Northwoods Montessori School (Atlanta, GA)

These forms may seem tedious for the teacher, but they portray a serious attempt to convey detail and teacher observations for both preschool and elementary levels.



NORTHWOODS MONTESSORI CENTER
3340 CHESTNUT DRIVE
ATLANTA, GEORGIA 30340

NAME ______

NAME OF SCHOOL ______

______ ______ ______
Address City/State/Zip Phone

______ ______
Year Teacher

______ ______
Year Teacher

Please check (and enter date, if available) each lesson presented. Comments are appreciated.

EXERCISES OF PRACTICAL LIFE

Preliminary Exercises:

Carrying & Using a Chair ______
Opening & Closing a Door ______
Using Mats ______
Bean Spooning ______
Rice Pouring ______
Cloth Folding ______
First Sewing ______

Apron Folding ______
Clothespins ______
Nuts & Bolts ______
Nuts & Bolts Bars ______
Jars & Bottles ______
Peg Board ______

Applied Exercises

Water Pouring:
2 pitchers ______
Pitcher & glass ______

Pitcher & Cup & Saucer ______
Pitcher & Containers ______

Pitcher & Vases ______

Plant Watering ______
Handwashing ______

Leaf cleaning ______

Dressing Frames:
Buttons ______
Snaps ______
Zipper ______
Buckles ______
Hook & Eye ______

Bow Tying ______
Lacing ______
Lacing #2 ______
Safety Pins ______

Preliminary Paper Cutting ______
Paper Cutting
#1 ______ #2 ______ #3 ______ #4 ______

Metal Polishing ______
Wood Polishing ______
Mirror Polishing ______
Dusting ______
Preliminary Table Washing ______

Table Washing ______
Shoe Polishing ______
Sweeping ______
Flower Arranging ______
Table Setting

Food Preparation:
Apple Coring ______
Juice Squeezing ______

Vegetable Cutting ______
Bread Cutting ______

Beginning Sewing ______
Design Sewing ______

Button Sewing ______
Sequin Sewing ______

COMMENTS:

SENSORIAL MATERIALS

Cylinder Blocks ______
Language:
Positive ______
Comparative ______
Superlative ______

Broad Stair ______
Language:
Positive ______
Comparative ______
Superlative ______

Game I ______
Game II ______

Pink Tower ______
Ex. II-Two sides flush ______
Language:
Positive ______
Comparative ______
Superlative ______
Game I-Bldg at distance ______
Game II-Just smaller/larger ______

Red Rods ______
Language:
Positive ______
Comparative ______
Superlative ______
Game I ______
Game II ______

Color Box I ______
Language ______
Color Box II ______
Language ______
Game I-Matching from distance ______
Game II-Matching obj. in room ______
Game III-Same as II w/o taking tablet ______
Color Box III ______
1 group at a time ______
2 contrasting colors ______
3 or 4 " " ______
Color Wheel ______

Language:
Positive ______
Comparative ______
Superlative ______
Game: Just darker/lighter ______

Knobless Cylinders
Two sets ______
Four sets ______

Three sets ______
Towers ______

Expanded Mastery Checklists, Northwoods Montessori School (continued)

(preschool checklist continued)

Geometry Cabinet
Intro. Tray ____
Drawer 5 (Curvilinear) ____
Language ____
Drawer 6 (4 str. line) ____
Language ____

Drawer 1 (Circles) ____
Language ____
Drawer 2 (rectangles) ____
Drawer 3 (triangles) ____
Language ____

Drawer 4 (polygons) ____
Two Drawers Together ____

Geometry Cabinet & cards
Filled in ____
Thick Outline ____
Thin Outline ____
Game I-All 3 cards on 1 mat & insets on another ____
Game II-Game I reversed ____
Game III-Same as I but remove 1 set of cards & child discovers missing set ____
Game IV-Same as III but remove 1 inset ____

Biology Cabinet
Cards ____
Language ____

Constructive Triangles
Rectang. Box A ____
Constructive Triangles
Rectang. Box B ____

Constructive Triangles
Triangular Box ____
Constructive Triangles
Lg. Hexagonal Box ____

Constructive Triangles
Sm. Hexagonal Box ____

Superimposed Geom. Fig
Inscribed ____
Concentric ____
Tangent ____
Aligned ____

Binomial Cube ____
Decanomial Square ____
Trinomial Cube ____

Sound Boxes
Pairing ____
Grading ____

The Bells
Carrying, Striking & Using mute ____
Matching Diatonic Scale ____
Grading Diatonic Scale ____
Lang-Comp & Superlative of high & low ____
Lang.-Names of Notes ____
Matching Chromatic Scale ____
Grading Chromatic Scale ____
Lang-Names of Sharps & Flats ____

Touch Boards ____
Thermic Tablets ____
Fabrics ____
Baric Tablets ____

Geometric Solids ____
Progressive Exercises
#1 ____
#2 ____
#3 ____
#4 ____
Mystery Bag ____

COMMENTS:

LANGUAGE

Enrichment of Vocabulary

I. Objects of Environment

II. Language Cards

Sandpaper Letters (UNDERLINE letters presented to child. CIRCLE those she knows)

a b c d e f g h i j k l m n

o p q r s t u v w x y z

Greenboards ____

(preschool checklist: continued)

Moveable Alphabet

3 letter words ________ 4 letter words ________

longer words ________ phrases ________

sentences ________ stories ________

Metal Insets:

1. One shape ________ 2. Sec. Pres. ________

3. Two Diff Shapes ________ 4. One shape-2 positions ________

5. Three Diff shapes ________ 6. One shape-3 positions ________

7. Shading-dark>light ________ 8. Graded shading ________

9. Colored paper ________ 10. Designs ________

Small Metal Insets ________

Development of Handwriting:

Chalkboard-Letters ________ Chalkboard-Numbers ________

Paper-Letters ________ Paper-Numbers ________

Joining 2 letters ________ Longer words ________

Cursive/Manuscript Charts ________

Phrases ________ Sentences ________

Word Study:

-Plurals ________ -Compound words ________

-Capitalization ________ -Prefixes ________

-Suffixes ________ -Days of Week ________

-Months of Year ________

Reading:

Phonetic Obj. Game ________ Phonetic Cards ________

Phonogram Obj. Box ________ Phonogram Cards ________

Phonogram Booklets ________ Sm. Moveable Alphabet ________

List books child has read:

Expanded Mastery Checklists, Northwoods Montessori School (continued)

Puzzle Words ________

Reading Classification:

I. Objects in Env.

1. Sensorial apparatus ________ 2. Description of #1 ________

3. P.L. Material ________ 4. Parts of Room ________

5. Parts of P.L. exercises ________ 6. Fabrics ________

7. Geom. Solids ________ 8. ________

9. ________ 10. ________

Function of Words:

-The Article ________ -The Adjective ________ -Logical Adj game ________

-Detective Adj. game ________ -Conjunction ________ -Preposition ________

-Verb (Intrans.-Action) ________ -Verb (trans-Action w/obj ________

-Verb (tense) ________ -Verb (mental action) ________

-Verb (2 functions of same word) ________ Adverb ________

-Logical Adv. ________

Continuation of Commands:

-double command (#3) ________ -double command w/obj (#4) ________

_double command both w obj. (#5) ________

Sentence Analysis:

Stage I - Paper

A. Hunting Subject ________ B. Two Subjects ________

C. Hunting Object ________ D. Two Objects ________

E. 2 Sub & 2 Obj ________ F. Pronoun as Obj. ________

Stage II - Wooden

A. Adv. Extensions ________ B. Indirect Obj. ________

C. Small chart ________

Punctuation ________

Expanded Mastery Checklists, Northwoods Montessori School (continued)

(preschool checklist, continued)

Attributes ____________

Appositions ____________

COMMENTS:

MATHEMATICS

Numbers 1-10
# Rods ________ 1 sm/1 lg ________ 2 sm/2 lg ________

Sandpaper Numerals ________

\#Rods & Cards ____________

Ex. II (Show card, get rod) ________
Ex. III (Show rod, get card.) ________
Ex. IV (Bld. stair, child places cards randomly) ________
Ex. V (Show card, get card & rod - 1 sm/1 lg) ________
Ex. VI (Build 10s) ________ Ex. VI-b (Subtr comb of 10s) ________

Spindles boxes ________ Zero Game ________
Memory Game of Nos. ________ Cards & Counters ________
Ext. of C&C - child counts nature objects,etc. ____________

THE DECIMAL SYSTEM

Intro. Tray to G.B.
a. 3 p. lesson on name of categories ________________
b. fetching beads from supply ________________

Pres. With Cards ________________

Formation of complex Nos.
Stage I (Single category)
a. Give cards, ask for beads _____ b. Give beads, ask for cards _____

Stage II (2 adj. categories)
a. Give cards, ask for beads _____ b. Give beads, ask for cards _____

Stage III (3 adj. cat.)
a. Give cards, ask for beads _____ b. Give beads, ask for cards _____

Stage IV (4 adj. cat.)
a. Give cards, ask for beads _____ b. Give beads, ask for cards _____

Stage V (Non-adj. cat.)
a. Give cards, ask for beads _____ b. Give beads, ask for cards _____

Changing Exercise ________

COLLECTIVE EXERCISES

Static Add. ________ Dyn. Add. ________
Static Subtr. ______ Dyn. Subtr. ________
Minuend of 9000 _____ Memory Borrowing ________
Mult. (1st pres-multiplier of 3) ________
Multiplier higher than 3 ________
Static Div. ________ Dyn. Div (no r.) ________
Dyn. Div (w/r.) ________ Sm card as divisor ________
Introduce Skittles ________ Long Div. ____________
Long Div w/Skittles ________ 2 digit divisor above 20 ________
3 digit divisor ________

Stamp Game:
Addition ________ Subtraction ____________
Multiplication ________ Short Division ____________
Long Division ________ Division with 0 ____________

Dot Game:
a. first notation ________ b. adding in columns ________
(1 category at a time)

Word Problems:
a. Addition ____________ b. Subtraction ____________
c. Multiplication ________ d. Division ________________
e. Mystery ____________

TEENS AND TENS
11-19 Beads only ________ Teen board ________
11-19 Board & beads ________ Writing teens ________
Ten board (board & bars only) ________
Ten board (progression to 99) ________

LINEAR COUNTING
100 Chain ____________ 1000 Chain ____________

Expanded Mastery Checklists, Northwoods Montessori School (continued)

(preschool checklist, continued)

SKIP COUNTING
Sq. Chain of 5 ________ Cube Chain of 5 ________
Ex. sq. & cube chain together ________
All Sq. Chains ________ All Cube Chains ________

ADDITION
Add. Snake Game ________
Add. Strip Board ________
Ex. II a. Finding all comb. to make a number ________
b. chart on sq'd paper & put s in order ________
Ex. III a. Commutative law ________
b. Chart eliminating like comb. ________
Add. Chart 3 ________ Chart 4 ________
Chart 5 ________ Chart 6 (Blank) ________

SUBTRACTION
Subtr. Snake Game ________ Subtr. Strip Board ________
Bldg. Tables & subtracting ________
Subtr. Chart 2 ________ Subtr. Chart 3 ________

MULTIPLICATION
Mult. with Bead Bars ________
Ex. II (by 10) ________ Ex. III (All tables together) ________
Ex. IV (Decanomial Sq.) ________ Ex. V (Commutative Law) ________
Mult. Board ________ Mult. Chart 3 ________
Mult. Chart 4 ________ Mult. Chart 5 (blank) ________

DIVISION
Unit Div. Board ________
Ex. II a. Chart for ones w/o remainder ________
b. Chart for #s exactly divisible in groups ________
Ex. III Show relationship between mult. & div. w/colored bead bars ________

Div. Chart 1 ________ Div. Chart 2 (blank) ________

PASSAGE TO ABSTRACTION
Small Bead Frame
-Notation ________ -Making & writing complex #s ________
-Static Add. ________ -Dynamic add. ________
-Adding 1 cat. at a time ________ -Static subtr. ________
-Dynamic subtr. ________

Large Bead Frame
-Notation ________ -Making & writing complex #s
-Mult. w/multiplier in units ________
-Mult. w/multiplier higher than units ________
-Mult. by 10 ________

Short Div. w/Racks & Tubes ________
Long Div. w/Racks & Tubes ________

Fractions:
-Terminology ________
-Making booklet & labeling num/denom ________ -Equivalences ________
-Add. of same denom. ________ -Add. of diff denom. ________
-Subtr. • same denom. ________ -Subtr. diff. denom. ________
-Mult by whole # ________ -Mult a fraction by a frac ________

GEOMETRY
Draw & label all geom cabinet shapes ________
Measuring Straight line figures ________
Triangles - naming by sides ________
Triangles - naming by angles ________

COMMENTS:

CULTURAL SUBJECTS: HISTORY

Exercise:

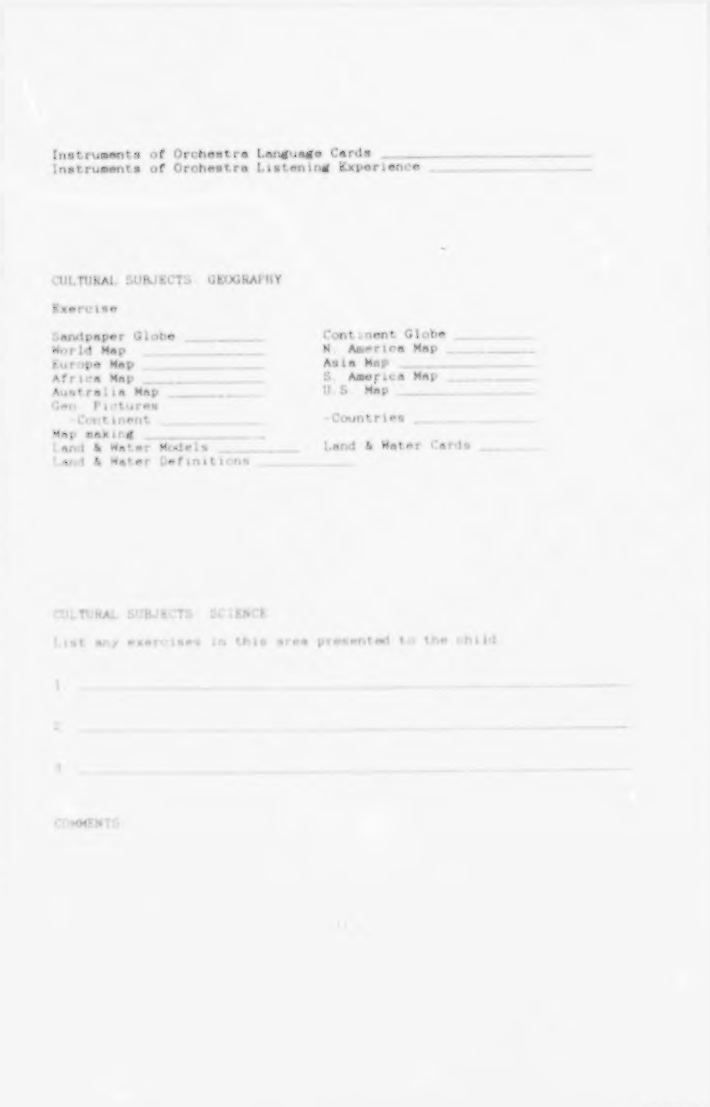
Pictures ________ Calendar ________
Chart on Div of Year ________ Days of Week ________
Clock
-Hour ________ -Half Hour ________ -Qtr. Hour ________ -Minutes ________
Past, Present, Future ________
Other:

CULTURAL SUBJECTS: MUSIC

Exercise:

Pulse ________ Rhythm Instruments ________

Expanded Mastery Checklists, Northwoods Montessori School (continued)



Instruments of Orchestra Language Cards ____________________
Instruments of Orchestra Listening Experience ______________

CULTURAL SUBJECTS: GEOGRAPHY

Exercise

Sandpaper Globe ________
World Map ________
Europe Map ________
Africa Map ________
Australia Map ________
Geo. Pictures
-Continent ________
Map making ________
Land & Water Models ________
Land & Water Definitions ________

Continent Globe ________
N. America Map ________
Asia Map ________
S. America Map ________
U.S. Map ________
-Countries ________
Land & Water Cards ________

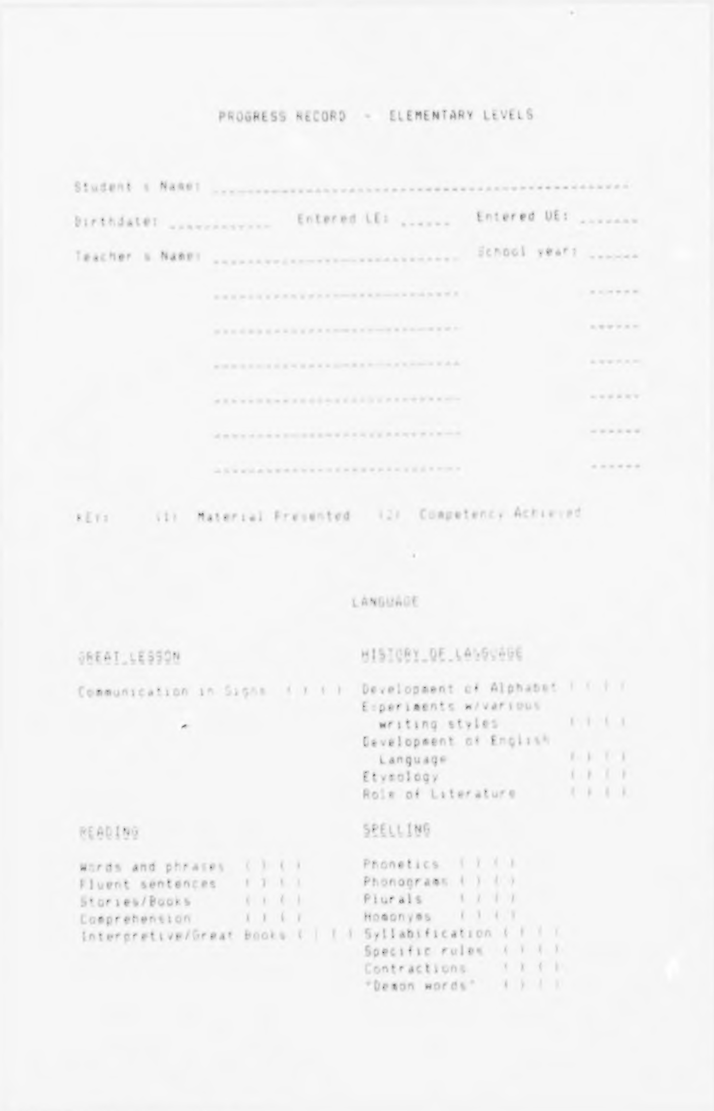
CULTURAL SUBJECTS: SCIENCE

List any exercises in this area presented to the child

1. ______________________________
2. ______________________________
3. ______________________________

COMMENTS:

(end of preschool checklist; beginning of elementary checklist)



PROGRESS RECORD - ELEMENTARY LEVELS

Student's Name: ______________________________
Birthdate: ________ Entered LE: ______ Entered UE: ______
Teacher's Name: ______________________ School year: ______
______________________ ______
______________________ ______
______________________ ______
______________________ ______
______________________ ______
______________________ ______

KEY: (1) Material Presented (2) Competency Achieved

LANGUAGE

GREAT LESSON

Communication in Signs ( ) ( )

HISTORY OF LANGUAGE

Development of Alphabet ( ) ( )
Experiments w/various writing styles ( ) ( )
Development of English Language ( ) ( )
Etymology ( ) ( )
Role of Literature ( ) ( )

READING

Words and phrases ( ) ( )
Fluent sentences ( ) ( )
Stories/Books ( ) ( )
Comprehension ( ) ( )
Interpretive/Great Books ( ) ( )

SPELLING

Phonetics ( ) ( )
Phonograms ( ) ( )
Plurals ( ) ( )
Homonyms ( ) ( )
Syllabification ( ) ( )
Specific rules ( ) ( )
Contractions ( ) ( )
"Demon words" ( ) ( )

Expanded Mastery Checklists, Northwoods Montessori School (continued)

COMPOSITION

Technical Skills:
complete sentences ( ) ( )
paragraph ( ) ( )
editing ( ) ( )
outlines ( ) ( )
end marks ( ) ( )
commas ( ) ( )
colon semi-colon ( ) ( )
quotation marks ( ) ( )
apostrophe ( ) ( )
hyphen ( ) ( )
capitalization ( ) ( )
business letter form ( ) ( )
friendly letter form ( ) ( )

Research Skills:
alphabetizing ( ) ( )
using table of contents ( ) ( )
using index ( ) ( )
using dictionary ( ) ( )
using encyclopedia ( ) ( )
using thesaurus ( ) ( )
library skills ( ) ( )
summarize orally ( ) ( )
written summaries ( ) ( )
notetaking ( ) ( )
research form ( ) ( )

Creative Writing:
comparison of styles ( ) ( )
prose ( ) ( )
poetry ( ) ( )
plays ( ) ( )

GRAMMAR/STYLE

Word Study:
suffixes ( ) ( )
prefixes ( ) ( )
compound words ( ) ( )
word families ( ) ( )
synonyms ( ) ( )
antonyms ( ) ( )

Sentence Analysis:
Simple sentences ( ) ( )
compound subject or verb ( ) ( )
direct object ( ) ( )
indirect object ( ) ( )
linking verbs (pred. nomin-
ative/pred. adjective ( ) ( )
adverbs ( ) ( )

Compound sentences ( ) ( )
Complex sentences ( ) ( )
Independent subordinate
clauses ( ) ( )
Diagramming ( ) ( )

Parts of Speech:
Noun ( ) ( )
common/proper ( ) ( )
abstract/concrete ( ) ( )
gender ( ) ( )
Article ( ) ( )
Adjective ( ) ( )
Verb ( ) ( )
transitive/intransitive ( ) ( )
voice ( ) ( )
mood ( ) ( )
tenses
simple ( ) ( )
perfect ( ) ( )
negative form ( ) ( )
verbals (participles, gerunds,
infinitives) ( ) ( )
preposition ( ) ( )
phrases (adj/adv) ( ) ( )
adverb ( ) ( )
pronoun ( ) ( )
personal ( ) ( )
possessive ( ) ( )
conjunction ( ) ( )
interjection ( ) ( )

(elementary checklist, continued)

MATHEMATICS

GREAT LESSON

Story of Numbers ( ) ( )

HISTORY OF MATHEMATICS

Exploring various
number systems ( ) ( )
Roman numerals ( ) ( )
History of measurement ( ) ( )

MATH FACTS

Addition facts ( ) ( )
Abstract addition ( ) ( )
Subtraction facts ( ) ( )
Abstract subtraction ( ) ( )
Multiplication facts ( ) ( )
Multiplication by tens ( ) ( )
Division facts ( ) ( )
Division by tens ( ) ( )
Simple word problems
(4 operations) ( ) ( )

MATH CONCEPTS & PROPERTIES

Hierarchical materials ( ) ( )
Commutative/distributive laws ( ) ( )
Multiples ( ) ( )
lowest common multiple ( ) ( )
prime numbers ( ) ( )
Factors ( ) ( )
prime factors ( ) ( )
Divisibility ( ) ( )
Fraction equivalence ( ) ( )

MEASUREMENT

Linear ( ) ( )
Volume ( ) ( )
Liquid ( ) ( )
Metric ( ) ( )
Money ( ) ( )

LONG MULTIPLICATION

Bead frame ( ) ( )
Flat frame ( ) ( )
Bank game ( ) ( )
Chequerboard ( ) ( )
Abstract ( ) ( )
Word problems ( ) ( )

LONG DIVISION

Racks & tubes ( ) ( )
Group division ( ) ( )
Abstract ( ) ( )
Word problems ( ) ( )

FRACTIONS

+ - w/same denom. ( ) ( )
x ÷ by whole numbers ( ) ( )
reducing fractions ( ) ( )
mixed numbers ( ) ( )
+ - w/diff. denom. ( ) ( )
x by a fraction ( ) ( )
÷ by a fraction ( ) ( )
abstract ( ) ( )
word problems ( ) ( )

(elementary checklist, continued)

Computer:

Introduction to keyboard ( ) ( )
Logo programming ( ) ( )
Word processing ( ) ( )
Data base/research ( ) ( )
________________________ ( ) ( )
________________________ ( ) ( )
________________________ ( ) ( )

COMMENTS: (Please date)

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Expanded Mastery Checklists, Northwoods Montessori School (continued)

DECIMALS

concept and notation ( ) ( )
converting fractions
 to decimals ( ) ( )
+ - decimals ( ) ( )
x ÷ decimals by a unit ( ) ( )
decimal chequerboard ( ) ( )
dividing by a decimal ( ) ( )
abstraction ( ) ( )
x ÷ by powers of ten ( ) ( )
word problems ( ) ( )

NEGATIVE NUMBERS ( ) ( )

PERCENTAGES
 concept ( ) ( )
 converting fractions
  & decimals to % ( ) ( )
 principal, interest
  rate, time ( ) ( )
 word problems ( ) ( )

RATIO AND PROPORTION

 concepts ( ) ( )
 cross multiplication ( ) ( )
 word problems ( ) ( )

POWERS OF NUMBERS

Games w/squares & cubes ( ) ( )
Squaring
 transformation of a square ( ) ( )
 passing to another square ( ) ( )
 squaring a sum ( ) ( )
 abstract ( ) ( )
Cubing
 passing to another cube ( ) ( )
 cubing a binomial ( ) ( )
 abstract ( ) ( )
Square root
 using materials ( ) ( )
 working on paper ( ) ( )
Cube root
 using material 2-digit ( ) ( )
 using material 3-digit ( ) ( )
 working on paper ( ) ( )
Bases and Powers ( ) ( )
Expanded Notation ( ) ( )
Non-decimal Bases ( ) ( )

ALGEBRA

balancing an equation ( ) ( )
solving for x ( ) ( )
word problems ( ) ( )

COMMENTS: (Please date)

(elementary checklist, continued)

GEOMETRY

NOMENCLATURE

Basic shapes of plane figures ( ) ( )
Lines ( ) ( )
Angles ( ) ( )
Measuring angles ( ) ( )
Triangles ( ) ( )
Polygons ( ) ( )
Measuring perimeters ( ) ( )
Circles ( ) ( )
Basic shapes of solid figures ( ) ( )
Polyhedrons ( ) ( )

EQUIVALENCE

concept ( ) ( )
Pythagorean Theorem ( ) ( )
inch material ( ) ( )

AREA OF PLANE FIGURES

rectangles ( ) ( )
other quadrilaterals ( ) ( )
triangles ( ) ( )
polygons ( ) ( )
circle ( ) ( )
word problems ( ) ( )

SOLIDS

total and lateral area ( ) ( )
concept of volume ( ) ( )
finding volume of
specific solids ( ) ( )

COMMENTS: (please date)

Expanded Mastery Checklists, Northwoods Montessori School (continued)

BIOLOGY

PREPARATION/NOMENCLATURE

organic/inorganic classification ( ) ( )
Introduction to Time Line of Life ( ) ( )
plant/animal classification ( ) ( )
parts of the plant ( ) ( )
external parts of animals ( ) ( )

BOTANY

PLANT PHYSIOLOGY

Needs of the Plant:
Leaf: functions ( ) ( )
parts ( ) ( )
varieties ( ) ( )

Roots: functions ( ) ( )
parts ( ) ( )
varieties ( ) ( )

Stems: functions ( ) ( )
parts ( ) ( )
varieties ( ) ( )

Fruit: functions ( ) ( )
parts ( ) ( )
varieties ( ) ( )

Fruit: functions ( ) ( )
parts ( ) ( )
varieties ( ) ( )

Seed: functions ( ) ( )
parts ( ) ( )
varieties ( ) ( )

Plant cells: parts ( ) ( )
photosynthesis ( ) ( )

CLASSIFICATION

Kingdom Vegetalia
& subdivisions ( ) ( )
Researching a family
or genus:

_________________ ( ) ( )

_________________ ( ) ( )

OTHER

History & uses of plants ( ) ( )
Famous botanists

_____________________ ( ) ( )

_____________________ ( ) ( )

_____________________ ( ) ( )

Tracing the geneology of a plant ( ) ( )
Plant Classification Tree ( ) ( )

Expanded Mastery Checklists, Northwoods Montessori School (continued)

(elementary checklist, continued)

ZOOLOGY

ANIMAL PHYSIOLOGY

animal stories ( ) ( )
vertebrate/invertebrate ( ) ( )
body functions:
 materials ( ) ( )
 dissections ( ) ( )
single cell animals ( ) ( )

HUMAN ANATOMY & PHYSIOLOGY

tissues ( ) ( )
organs ( ) ( )
systems ( ) ( )

personal health ( ) ( )
 (grooming, nutrition, substance abuse, exercise, etc.)

-------------------- ( ) ( )

-------------------- ( ) ( )

-------------------- ( ) ( )

-------------------- ( ) ( )

CLASSIFICATION

kingdom Animalia &
 subdivisions ( ) ( )
tracing geneology of
 of an animal ( ) ( )
Animal Classification Tree ( ) ( )

OTHER :

Research
Famous zoologists/physiologists:
-------------------- ( ) ( )

-------------------- ( ) ( )

ECOLOGY

ECOSYSTEMS ( ) ( )

INTERDEPENDENCIES ( ) ( )

HUMAN'S EFFECT ON ENVIRONMENT ( ) ( )

COMMENTS:

GEOGRAPHY

UNIVERSE

Great Lesson--
 The Creation ( ) ( )
solar system ( ) ( )
stars/galaxies ( ) ( )
---------------- ( ) ( )
---------------- ( ) ( )
---------------- ( ) ( )

COMPOSITION OF EARTH

layers/core ( ) ( )
rocks/minerals ( ) ( )
mountain building ( ) ( )
volcanoes ( ) ( )
erosion ( ) ( )
---------------- ( ) ( )
---------------- ( ) ( )
---------------- ( ) ( )

WORK OF AIR

properties of air ( ) ( )
the winds ( ) ( )
layers of atmos-
 phere (protection) ( ) ( )
effect of heat on
 land and water ( ) ( )
ocean currents ( ) ( )
weather ( ) ( )
---------------- ( ) ( )
---------------- ( ) ( )
---------------- ( ) ( )

PHYSICAL GEOGRAPHY

continents/oceans ( ) ( )
land & water forms ( ) ( )
major rivers ( ) ( )
major mountain
 ranges ( ) ( )

ECONOMIC GEOGRAPHY

production/consumption ( ) ( )
imports/exports ( ) ( )
charts and graphs ( ) ( )

NATURE OF THE ELEMENTS

Three states of matter ( ) ( )
Further states of matter ( ) ( )
Different ways of
 combining ( ) ( )
Attraction of earth/
 gravity ( ) ( )

SUN/EARTH

Earth's orbit ( ) ( )
Earth's rotation ( ) ( )
perpendicular and
 oblique rays ( ) ( )
solstices/seasons ( ) ( )
time zones ( ) ( )
climate zones ( ) ( )

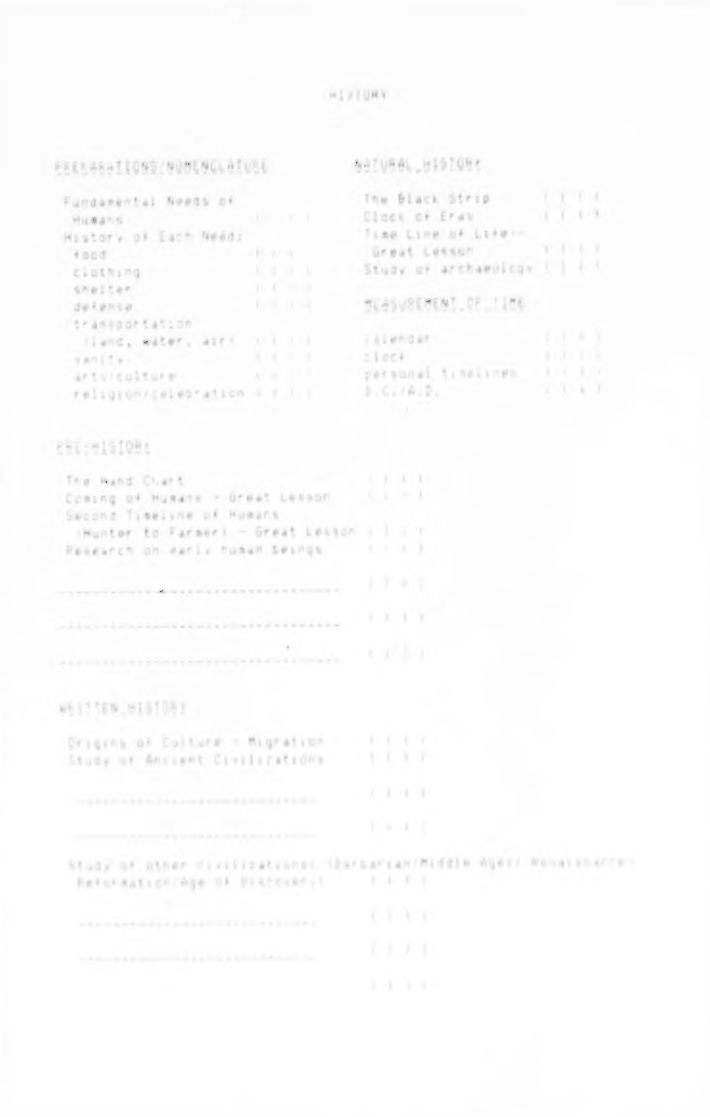
WORK OF WATER

work of the river ( ) ( )
rain ( ) ( )
waves ( ) ( )
ice ( ) ( )
water cycle ( ) ( )

POLITICAL GEOGRAPHY

countries of each continent ( ) ( )
capitals ( ) ( )
states and capitals ( ) ( )
map skills ( ) ( )

Expanded Mastery Checklists, Northwoods Montessori School (continued)



HISTORY

PREPARATIONS/NOMENCLATURE

Fundamental Needs of Humans ( ) ( ) ( ) ( )
History of Each Need:
food ( ) ( ) ( ) ( )
clothing ( ) ( ) ( ) ( )
shelter ( ) ( ) ( ) ( )
defense ( ) ( ) ( ) ( )
transportation (land, water, air) ( ) ( ) ( ) ( )
vanity ( ) ( ) ( ) ( )
arts/culture ( ) ( ) ( ) ( )
religion/celebration ( ) ( ) ( ) ( )

NATURAL HISTORY:

The Black Strip ( ) ( ) ( ) ( )
Clock of Eras ( ) ( ) ( ) ( )
Time Line of Life-- Great Lesson ( ) ( ) ( ) ( )
Study of archaeology ( ) ( ) ( ) ( )

MEASUREMENT OF TIME

calendar ( ) ( ) ( ) ( )
clock ( ) ( ) ( ) ( )
personal timelines ( ) ( ) ( ) ( )
B.C./A.D. ( ) ( ) ( ) ( )

PRE-HISTORY:

The Hand Chart ( ) ( ) ( ) ( )
Coming of Humans - Great Lesson ( ) ( ) ( ) ( )
Second Timeline of Humans (Hunter to Farmer) - Great Lesson ( ) ( ) ( ) ( )
Research on early human beings ( ) ( ) ( ) ( )

------------------------------ ( ) ( ) ( ) ( )

------------------------------ ( ) ( ) ( ) ( )

------------------------------ ( ) ( ) ( ) ( )

WRITTEN HISTORY:

Origins of Culture - Migration ( ) ( ) ( ) ( )
Study of Ancient Civilizations ( ) ( ) ( ) ( )

------------------------------ ( ) ( ) ( ) ( )

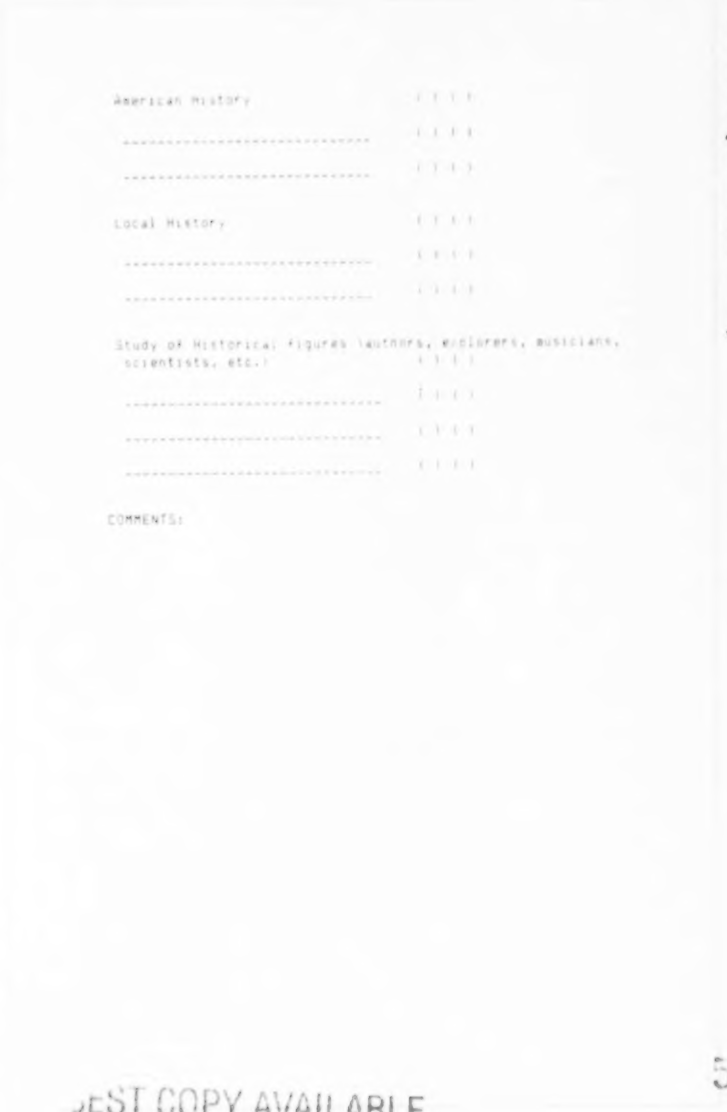
------------------------------ ( ) ( ) ( ) ( )

Study of other civilizations: (Barbarian/Middle Ages/ Renaissance/ Reformation/Age of Discovery) ( ) ( ) ( ) ( )

------------------------------ ( ) ( ) ( ) ( )

------------------------------ ( ) ( ) ( ) ( )

( ) ( ) ( ) ( )



American History ( ) ( ) ( ) ( )

------------------------------ ( ) ( ) ( ) ( )

------------------------------ ( ) ( ) ( ) ( )

Local History ( ) ( ) ( ) ( )

------------------------------ ( ) ( ) ( ) ( )

------------------------------ ( ) ( ) ( ) ( )

Study of Historical figures (authors, explorers, musicians, scientists, etc.) ( ) ( ) ( ) ( )

------------------------------ ( ) ( ) ( ) ( )

------------------------------ ( ) ( ) ( ) ( )

------------------------------ ( ) ( ) ( ) ( )

COMMENTS:

(elementary checklist, continued)

Expanded Mastery Checklists, Northwoods Montessori School (continued)

(elementary checklist, continued)

INTEGRATED CURRICULUM COMPONENTS

VISUAL ARTS

Techniques/Media:

pencil ( ) ( )
charcoal ( ) ( )
pastel ( ) ( )
watercolor ( ) ( )
acrylic ( ) ( )
tempera ( ) ( )

collage ( ) ( )
weaving ( ) ( )
pottery ( ) ( )
sculpture ( ) ( )
others:
____________ ( ) ( )
____________ ( ) ( )

life drawing ( ) ( )
shading ( ) ( )
perspective ( ) ( )
color theory ( ) ( )
composition ( ) ( )

others
__________ ( ) ( )
__________ ( ) ( )
__________ ( ) ( )

Appreciation:

schools of art ( ) ( )
artists ( ) ( )
museums ( ) ( )
other:
________________ ( ) ( )
________________ ( ) ( )
________________ ( ) ( )

COMMENTS:

PERFORMING ARTS

drama ( ) ( )
mime ( ) ( )
recitation ( ) ( )
dance/creative movement ( ) ( )
choral singing ( ) ( )
soloist ( ) ( )
musical instrument ( ) ( )
other:
________________ ( ) ( )
________________ ( ) ( )
________________ ( ) ( )

COMMENTS:

MUSIC

Musical Periods:

Composers:

Instruments:

Rhythm development:

Rhythm notation:

Pitch development:

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Expanded Mastery Checklists, Northwoods Montessori School (continued)

(elementary checklist, continued)

Pitch notations:

Major scales/keys:

Minor scales/keys:

Transposing:

Original composition:

Reading music with instrument:

Reading music with voice:

Harmony:

Other:

COMMENTS:

PHYSICAL EDUCATION

Field Events:

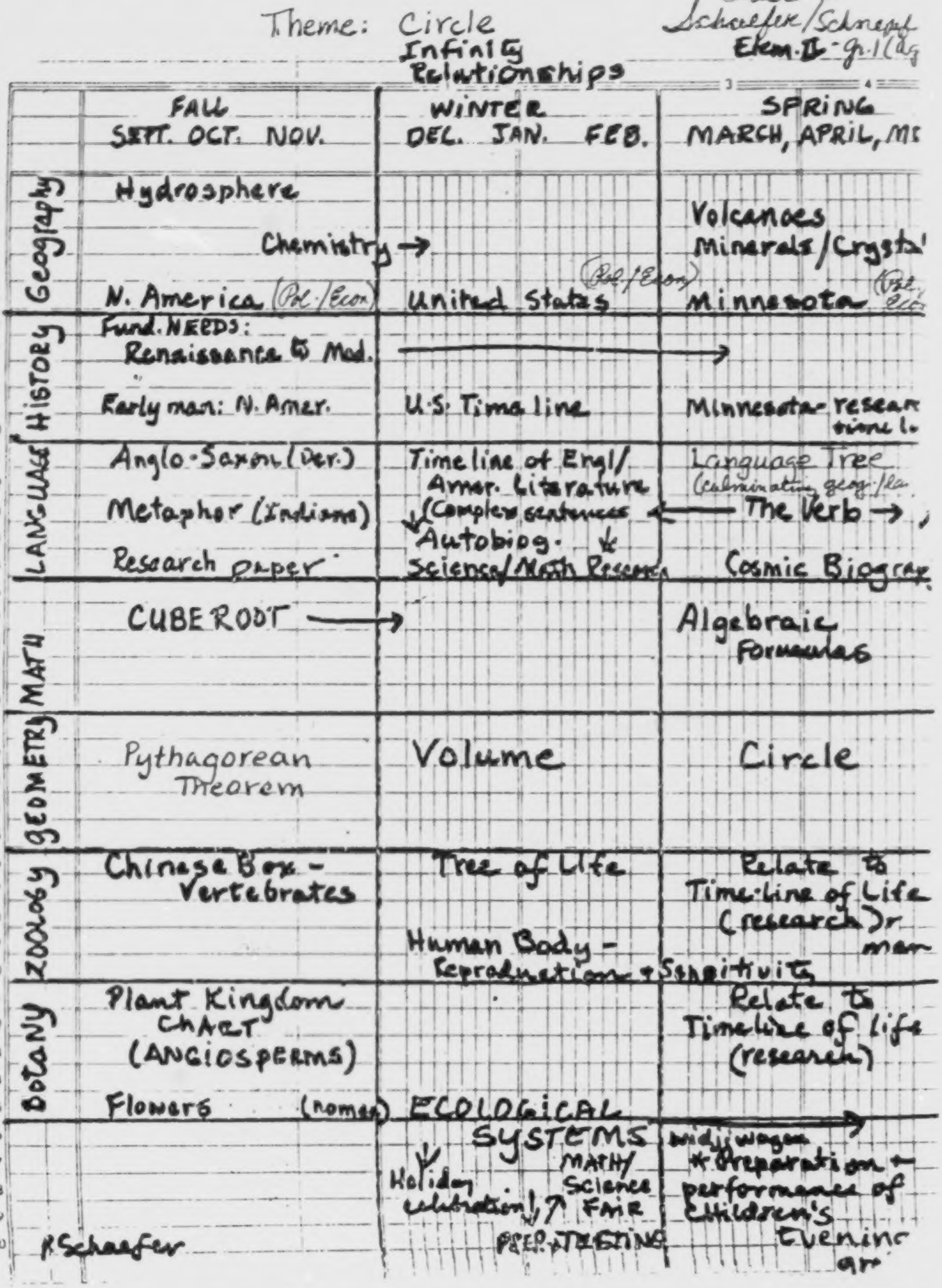
Team Sports:

Folk Games:

Relays and other games:

COMMENTS:

Annual Teacher Planning Document by Seasons



Theme: Circle
Infinity
Relationships

Class G
Schaefer/Schnepf
Elem. II - Gr. 1(Ag

	FALL SEPT. OCT. NOV.	WINTER DEC. JAN. FEB.	SPRING MARCH, APRIL, MA
Geography	Hydrosphere Chemistry → N. America (Pol./Econ)	United States (Pol./Econ)	Volcanoes Minerals/Crysta Minnesota (Pol./Eco
History	Fund. NEEDS: Renaissance to Mod. Early man: N. Amer.	————————→ U.S. Time line	Minnesota - resear time l.
LANGUAGE	Anglo-Saxon (Der.) Metaphor (Indians) Research paper	Timeline of Engl/ Amer. Literature ↓ (Complex sentences Autobiog. ↓ Science/Math Research	Language Tree (culminating geog./la ← The Verb → Cosmic Biograp
MATH	CUBE ROOT ——→		Algebraic Formulas
GEOMETRY	Pythagorean Theorem	Volume	Circle
ZOOLOGY	Chinese Box - Vertebrates	Tree of Life Human Body - Reproduction +	Relate to Time-Line of Life (research) r man Sensitivity
BOTANY	Plant Kingdom CHART (ANGIOSPERMS) Flowers (nomen)	ECOLOGICAL	Relate to Timeline of life (research)
	R Schaefer	SYSTEMS ——→ ↓ Holiday celebration ↓ ↗ MATH/ Science FAIR PREP. TESTING	midyjwagen * Preparation + performance of Children's Evening ar

Right out of an elementary teacher's notebook, this plan sets very general goals for the year, suggesting seasonal emphasis without overemphasizing preconceived notions. (Reprinted from NAMTA's *Implementing Montessori Education in the Public Sector*, 1990.)

Suggested Preschool Work Levels

2½ - 3½

Practical Life	Sensorial	Language	Cultural
Spooning	Solid Cylinders 1 2 3 4	Vocabulary Enrichment	Land and Water Forms
Pouring	Pink Tower		
Button Frame	Broad Stair		Sandpaper Globe
Zipper	Red Rods		Colored Globe
Snaps	Color Boxes 1 2 3	Sound Games	Continent Map
Buckle	Touch Tablets		
Hook and Eye	Fabrics	Sandpaper Letters a b c d e f g h i j k l m n o p q r s t u v w x y z	
Tying	Geometric Cabinet 1 2 3 4 5 6 Cards		
Lacing	Geometric Solids		
Safety Pin	Sorting		
Washing Hands	Mystery Bag		
Polishing	Baric Tablets		
Polishing Shoes	Thermic Tablets		
Washing a Table	Sound Boxes		
Dusting	Bells matching grading		
Sweeping	Binomial Cube		
Folding			
Flower Arranging			

Work levels help establish some sense of pace and accountability. Courtesy of Midwest Montessori Training Center (Milwaukee, WI). See chapter 12 for a discussion of establishing work levels for a whole school by teacher consensus.

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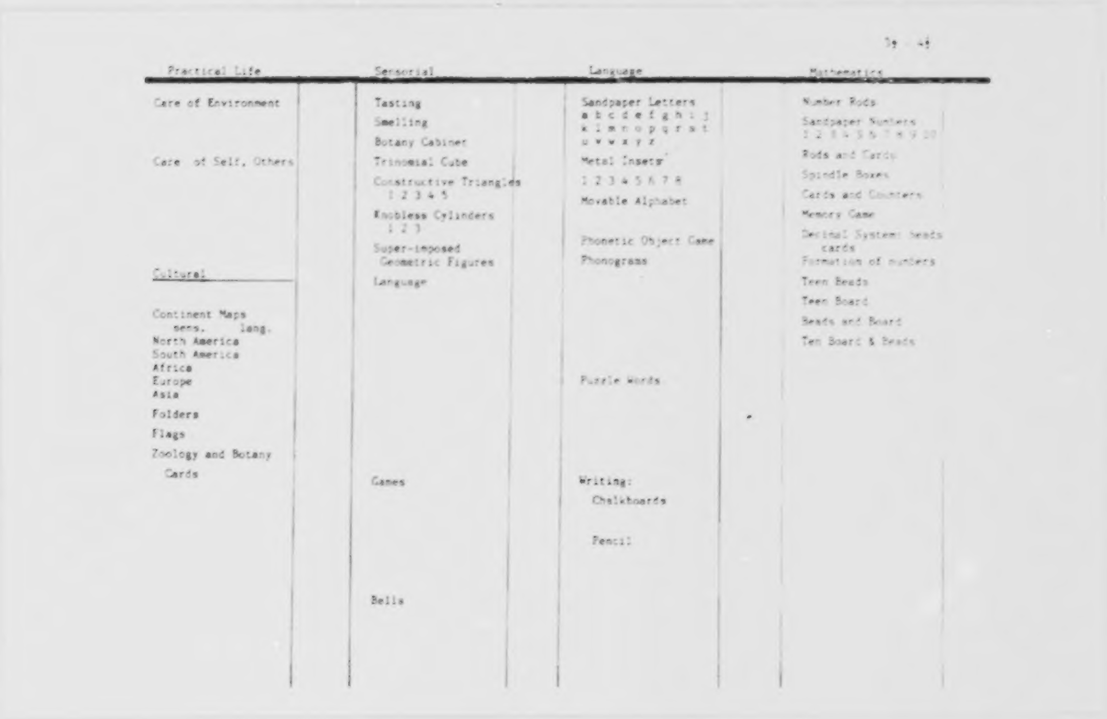
Suggested Preschool Work Levels (continued)



3½ - 4½

Practical Life

Care of Environment

Care of Self, Others

Cultural

Continent Maps
sens. lang.
North America
South America
Africa
Europe
Asia

Folders

Flags

Zoology and Botany
Cards

Sensorial

Tasting

Smelling

Botany Cabinet

Trinomial Cube

Constructive Triangles
1 2 3 4 5

Knobless Cylinders
1 2 3

Super-imposed
Geometric Figures

Language

Games

Bells

Language

Sandpaper Letters
a b c d e f g h i j
k l m n o p q r s t
u v w x y z

Metal Insets
1 2 3 4 5 6 7 8

Movable Alphabet

Phonetic Object Game

Phonograms

Puzzle Words

Writing:
Chalkboards

Pencil

Mathematics

Number Rods

Sandpaper Numbers
1 2 3 4 5 6 7 8 9 10

Rods and Cards

Spindle Boxes

Cards and Counters

Memory Game

Decimal System: beads
cards

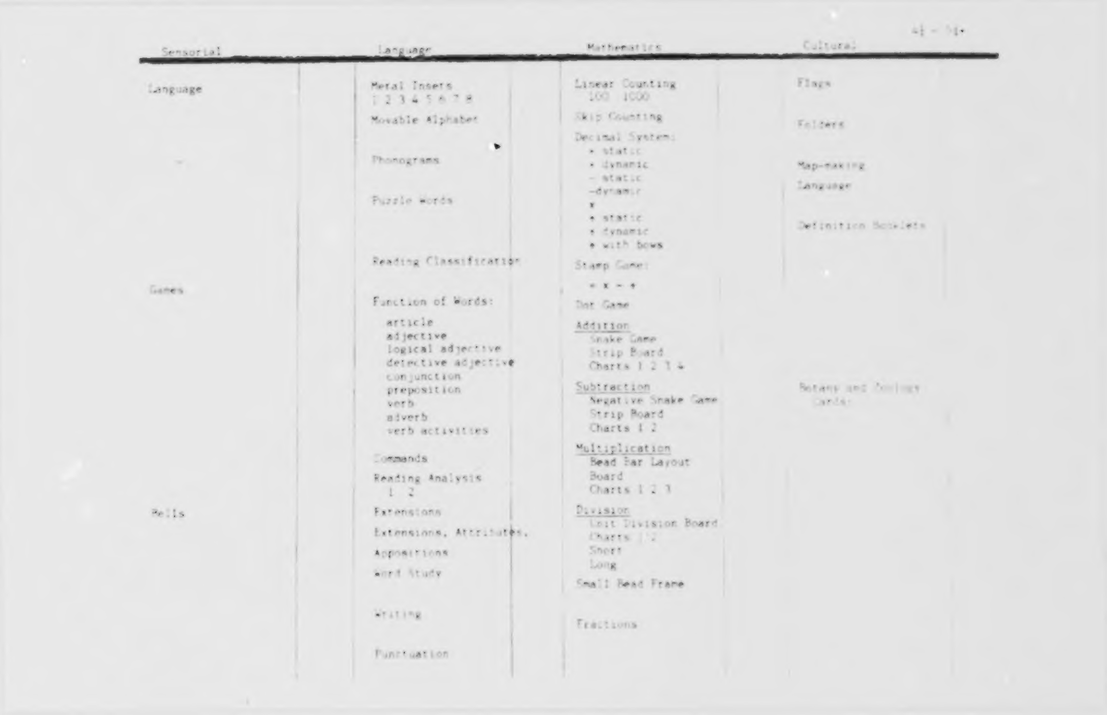
Formation of numbers

Teen Beads

Teen Board

Beads and Board

Ten Board & Beads



4½ - 5½+

Sensorial

Language

Games

Bells

Language

Metal Insets
1 2 3 4 5 6 7 8

Movable Alphabet

Phonograms

Puzzle Words

Reading Classification

Function of Words:
- article
- adjective
- logical adjective
- detective adjective
- conjunction
- preposition
- verb
- adverb
- verb activities

Commands

Reading Analysis
1 2

Extensions

Extensions, Attributes,

Appositions

Word Study

Writing

Punctuation

Mathematics

Linear Counting
100 1000

Skip Counting

Decimal System:
- + static
- + dynamic
- − static
- −dynamic
- ×
- ÷ static
- ÷ dynamic
- ÷ with bows

Stamp Game:
+ × − ÷

Dot Game

Addition
- Snake Game
- Strip Board
- Charts 1 2 3 4

Subtraction
- Negative Snake Game
- Strip Board
- Charts 1 2

Multiplication
- Bead Bar Layout
- Board
- Charts 1 2 3

Division
- Unit Division Board
- Charts 1 2
- Short
- Long

Small Bead Frame

Fractions

Cultural

Flags

Folders

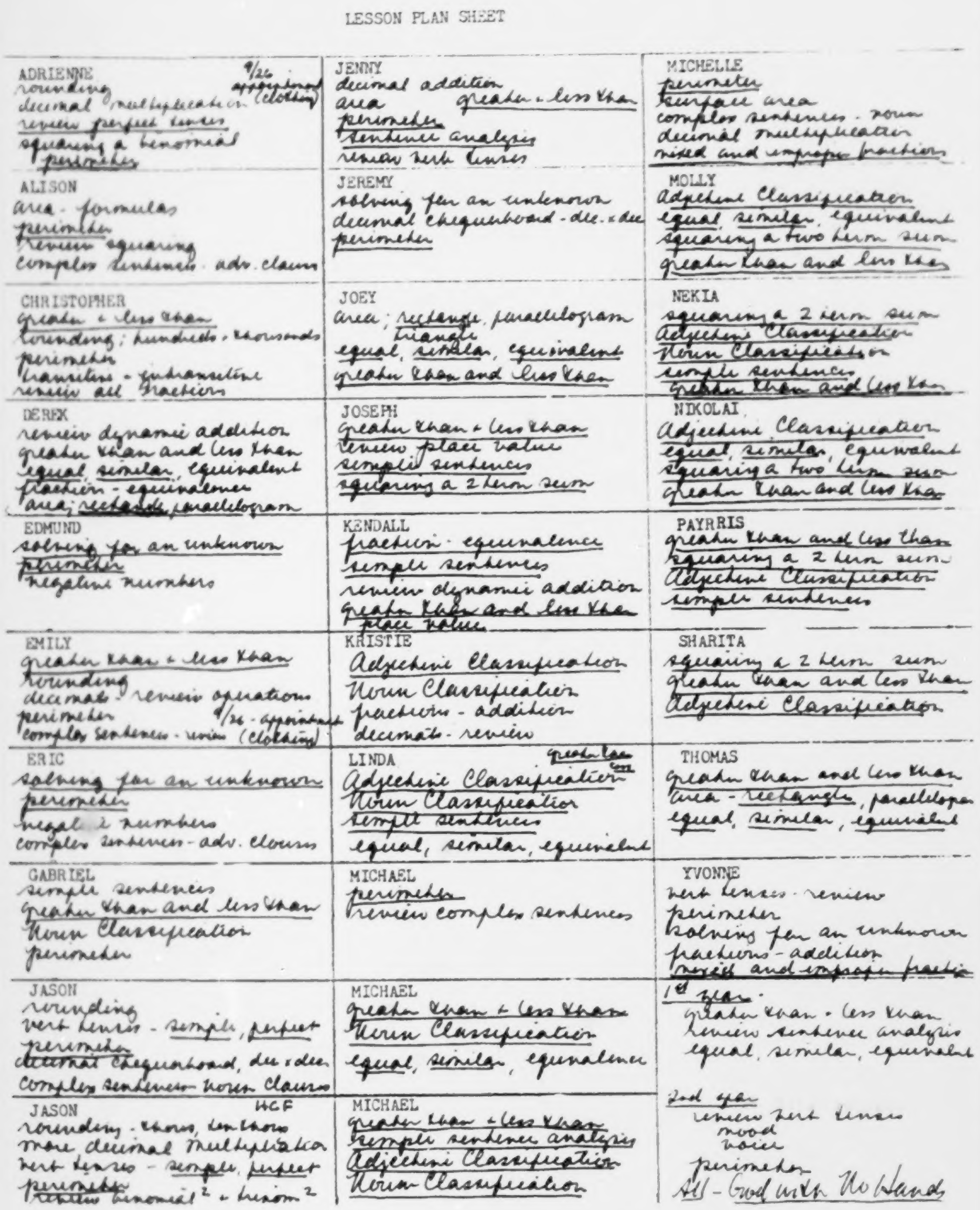
Map-making

Language

Definition Booklets

Botany and Zoology
Cards

Weekly Lesson Plan Sheet for Whole Class

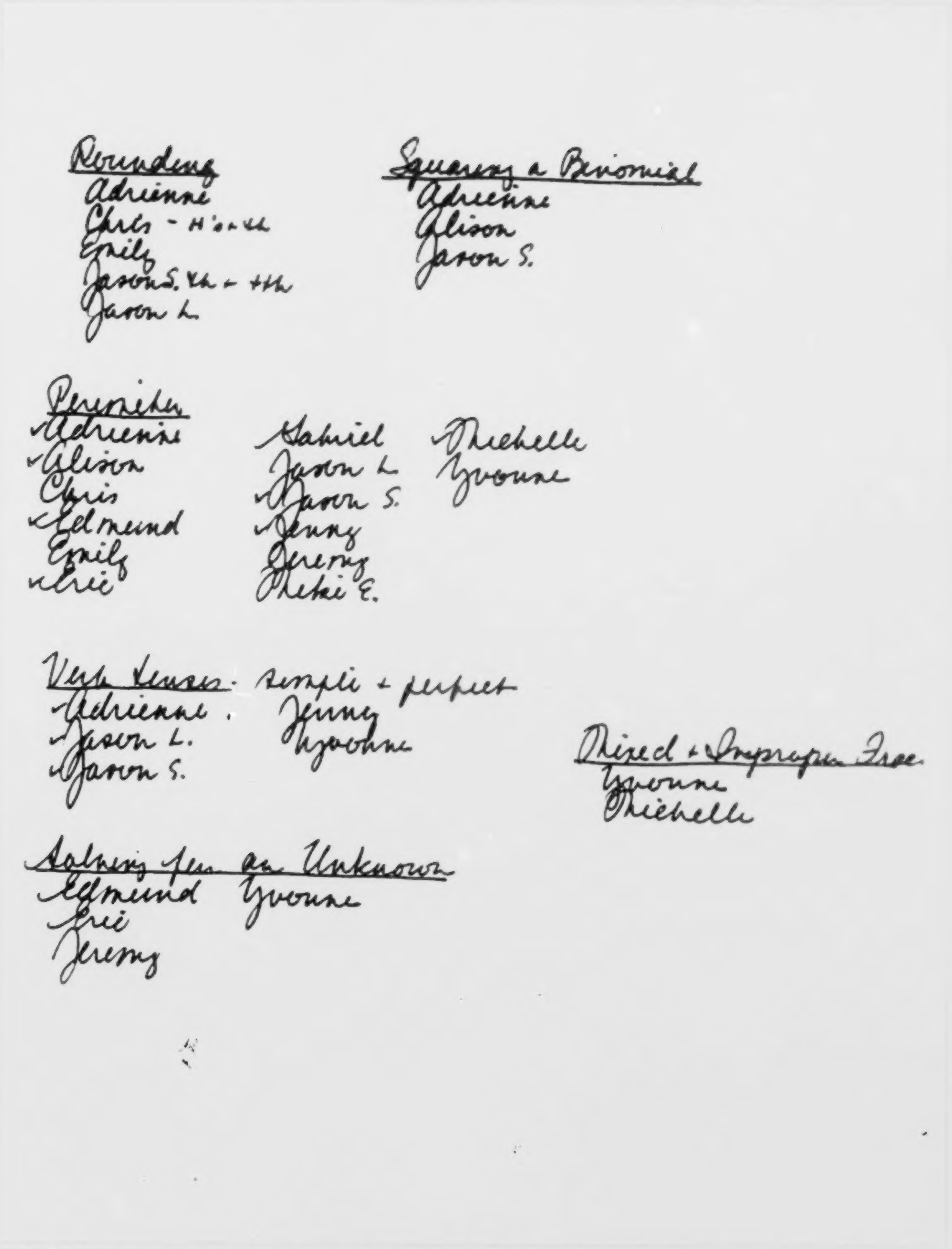


LESSON PLAN SHEET

ADRIENNE 9/26 appointment (clothing) rounding decimal multiplication review perfect tenses squaring a binomial perimeter	JENNY decimal addition area greater + less than perimeter sentence analysis review verb tenses	MICHELLE perimeter surface area complex sentences - noun decimal multiplication mixed and improper fractions
ALISON area - formulas perimeter review squaring complex sentences - adv. clause	JEREMY solving for an unknown decimal checkerboard - dec. x dec perimeter	MOLLY Adjective Classification equal, similar, equivalent squaring a two term sum greater than and less than
CHRISTOPHER greater + less than rounding; hundreds + thousands perimeter transitive + intransitive review all fractions	JOEY area; rectangle, parallelogram, triangle equal, similar, equivalent greater than and less than	NEKIA squaring a 2 term sum Adjective Classification Noun Classification simple sentences greater than and less than
DEREK review dynamic addition greater than and less than equal, similar, equivalent fraction - equivalence area; rectangle, parallelogram	JOSEPH greater than + less than review place value simple sentences squaring a 2 term sum	NIKOLAI Adjective Classification equal, similar, equivalent squaring a two term sum greater than and less than
EDMUND solving for an unknown perimeter negative numbers	KENDALL fraction - equivalence simple sentences review dynamic addition greater than and less than place value	PAYRRIS greater than and less than squaring a 2 term sum Adjective Classification simple sentences
EMILY greater than + less than rounding decimals - review operations perimeter 9/26 - appointment complex sentences - review (clothing)	KRISTIE Adjective Classification Noun Classification fractions - addition decimals - review	SHARITA squaring a 2 term sum greater than and less than Adjective Classification
ERIC solving for an unknown perimeter nega[illegible]e numbers complex sentences - adv. clause	LINDA greater than less Adjective Classification Noun Classification simple sentences equal, similar, equivalent	THOMAS greater than and less than area - rectangle, parallelogram equal, similar, equivalent
GABRIEL simple sentences greater than and less than Noun Classification perimeter	MICHAEL perimeter review complex sentences	YVONNE verb tenses - review perimeter solving for an unknown fractions - addition mixed and improper fractions
JASON rounding verb tenses - simple, perfect perimeter decimal checkerboard, dec x dec complex sentences - noun clause	MICHAEL greater than + less than Noun Classification equal, similar, equivalence	1st year. greater than + less than review sentence analysis equal, similar, equivalent
JASON HCF rounding - thous, ten thous more decimal multiplication verb tenses - simple, perfect perimeter review binomial^2 + trinom^2	MICHAEL greater than + less than simple sentence analysis Adjective Classification Noun Classification	2nd year review verb tenses mood voice perimeter All - God with No Hands

One sheet detailing individualized lessons for the whole week, at the elementary level. Children can use this sheet to review their work options. When the lesson is given, it is underlined. Lessons not given are entered on the following week's sheet. (Reprinted from NAMTA's *Implementing Montessori Education in the Public Sector*, 1990.)

Weekly Group Lessons Derived from Weekly Lesson Plan Sheet



Rounding
Adrienne
Chris - [illegible]
Emily
Jason S. [illegible]
Jason L.

Squaring a Binomial
Adrienne
Alison
Jason S.

Perimeter
✓Adrienne
✓Alison
Chris
✓Edmund
Emily
✓Eric
Gabriel
Jason L
✓Jason S.
✓Jenny
Jeremy
Mike E.
✓Michelle
Yvonne

Verb tenses - simple + perfect
✓Adrienne
✓Jason L.
✓Jason S.
Jenny
Yvonne

Mixed + Improper Frac.
Yvonne
Michelle

Solving for an Unknown
Edmund
Eric
Jeremy
Yvonne

Children who are to receive the same lesson are grouped for presentation purposes. (Reprinted from NAMTA's *Implementing Montessori Education in the Public Sector*, 1990.)

The Cycle of Evaluative Inquiry with School Staff

Introduction: A Climate of Ongoing Evaluation

The head's relationship with teachers forms another key part of the school's cycle of evaluative inquiry. Heads of school make observations, reflect with teachers through retreats and staff meetings, ask relevant questions, and lead the school in collaborative decision making. This natural evaluative process is initiated by the head in collaboration with the teacher.

Factors Working Against Ongoing Evaluative Inquiry

There are a number of factors in a school staff that might work against establishing a schoolwide climate of ongoing evaluation. Recognition of these factors can help the head of school to address them in concrete ways.

- **Fear of Failure:** In the classroom, we create an attitude that is "friendly toward mistakes." Adults also need to be encouraged to take independent action and make reasoned decisions without risk of ridicule or judgment. In such a climate, mistakes often become the springboard for new ideas.
- **Isolation:** Teachers spend much of their day isolated from other adults. Although they learn a great deal from observation within their own class, their planning and practice can be further developed through interaction and dialogue with other teachers. All teachers need the head of school to act as an occasional "sounding board" to help them articulate their own questions and ideas and to offer ongoing support.

- **Ego/Competition:** Within the school, teachers sometimes compare themselves to each other and strive for recognition. The head must actively demonstrate an appreciation of the diverse styles, abilities, and needs of individual staff. The support of curriculum consensus and general program consistency should not lead to standardization of individual practice. Every staff member, even the most confident, needs personal and specific recognition from the head.
- **Defensiveness:** Defensiveness is a psychological shield against anxiety. Many circumstances can create anxiety, particularly change, anger, challenge, and demands. The head must set a consistently positive, affirming tone. Negative comments only create resistance and greater defensiveness. Careful questions encourage individuals to express ideas and feelings in a supportive environment.
- **Desire to Please:** Staff can be motivated by the desire to please and by perceived pressure from others. This is particularly the case with parent demands. Without careful evaluation, subtle shifts in procedures to please parents or board members can erode the focus of the school's program.
- **False Esteem:** Related to the desire to please is reliance on external validation. Individuals who are primarily motivated by rewards, praise, or fear of disapproval rarely exhibit the highest levels of independent thinking and creativity. The head should avoid either praise or condemnation in relations with staff. Sharing observations and asking deeper questions encourages self-esteem and development of internal motivation.
- **Short-Term Thinking:** Emphasizing quick results or a quantifiable product can limit the larger purpose of the Montessori program. The noise level may indeed have decreased, but what is happening to the social interaction? Ongoing evaluation is thwarted when short-term goals become end products.

To counteract these limiting factors and create a climate of ongoing evaluation, the head should prioritize three roles in relations with staff:

- Creating trust through regular interaction with individual staff members.
- Linking individuals to resources within the staff community by enhancing collegiality.
- Connecting individuals with opportunities for professional development.

Creating Trust

Teachers are neither born nor made. Rather, teachers develop; and that development takes place primarily within the context of the school. One of the head's most important jobs is to assist the development of the faculty. To do this, the head must know each individual on staff in a personal way. Establishing trust and personal knowledge is at the heart of leadership.

Each teacher brings a unique personality to his or her work. Each has a set of gifts and challenges and a particular style of interaction. But there are also some common characteristics of teachers at different stages of their development. The needs and tendencies of the new teacher are different from those of the teacher who has established a fluid classroom practice. And an experienced teacher who is questioning the potential and possibilities of his or her role needs interactions and opportunities that are not identical to those needed by a very dedicated seasoned teacher. Only through ongoing dialogue can the head know both the unique attributes and the general stage of development of each individual (see this chapter's FYI article on teacher stages of development). This kind of exploration takes time, yet making this time a priority is essential to developing the potential of the school's staff.

Observation: In the Classroom

As part of the observation phase of the cycle of evaluative inquiry, the head should observe regularly in each classroom. Frequent short visits are more valuable than one observation prior to a formal evaluation. The goal of observation is to experience the reality of the teacher in the class and to build a context of shared observation, which forms the basis for ongoing dialogue and inquiry. Regular visits by the head, coupled with ongoing conversation (see Regular Conversation below) defuse the sense of threat or anxiety that the teacher may initially experience. In such an atmosphere, the teacher also feels free to ask the head to observe and give feedback on specific dynamics in the class. Some tips for observing in classrooms include:

- Enter quietly without disrupting the class and greet the teacher with a smile.
- Observe at different times of the day, including lunch and outdoor periods.
- Take brief notes that can be used for later conversation.
- Observe with a class roster in hand to learn the names of all the children in a class. This makes it easier to discuss specific classroom dynamics and interactions.
- Try to make one positive comment to the teacher on the same day you observe. Use open-ended statements that may encourage reflection—e.g., "Hannah was so absorbed in arranging flowers today" or "I noticed that John stays very close to Samantha."

Reflection and Questioning through Regular Conversations

Arrange regular discussion meetings with each individual faculty member. Ideally, the teacher and head meet together once a month. These meetings are scheduled in advance for the convenience of the teacher (generally after school or during a lunch hour). Through regular discussions, the head and teacher build rapport so that teachers can look forward to these opportunities to talk candidly about their work. This is especially true if the teacher has already asked the self-evaluation questions mentioned in Chapter 11 and has prepared to discuss them with the head of school. Informal meetings at appropriate times are also valuable. Keep in mind the following suggestions:

- Allow the teacher to set the agenda. One of the major goals of these meetings is to develop intimate understanding of the teacher's perspective.
- Model the cycle of evaluative inquiry in discussions. Encourage focus on observation, reflection, and eliciting questions in addition to discussing activities and plans.
- Use notes from your classroom observations to augment the teacher's own observation and to raise questions for discussion.
- Refrain from offering solutions. As rapport builds, constructive guidance can be offered in response to a teacher's request for ideas or opinions. The best guidance is that which helps teachers to propose their own solutions.

A head of school who feels that he or she does not have the expertise to conduct a classroom based discussion can delegate this task to a curriculum supervisor.

Action/Decision: Dealing with Concerns as They Arise

The head must deal with concerns and problems as they arise. Issues that are not addressed do not go away; instead, they tend to fester and erupt later as larger problems. If the head has created intimacy through regular observations and discussions, it is much easier to approach a staff member about an area of concern. Keep in mind some basic guidelines that will make these meetings constructive rather than confrontational:

- Go directly to the individual as soon as you have a concern. Anticipate difficulties before they become major problems.
- State observations clearly. Refrain from judging or imputing motives. Allow the teacher to respond fully to your observations.
- Assure the staff member of your respect and of your confidence that she or he can create a positive resolution to the issue. Demonstrate your willingness to actively support the teacher in developing a solution and elicit the teacher's suggestions for specific kinds of assistance.
- Determine together the appropriate follow-up to the meeting.
- Put agreements in writing.

Linking to Resources by Enhancing Collegiality

Both independence and interdependence are valued in the Montessori school; some of the most valuable resources for staff development are the other staff members. The head coordinates efforts to enhance collegiality and bring staff together in a variety of groupings for mutual reflection, questioning, and decision making. By prioritizing time for interpersonal relationships and community dialogue, the work of the staff as a whole becomes more purposeful and integrated.

Staff Meetings

Regular meetings of staff are integrated into the school schedule. Some schools designate one afternoon each week when all faculty remain on site for extended hours and all staff meetings are scheduled on this day. This plan allows for *ad hoc* groups and unscheduled meetings to be added as needed during the year without inconveniencing staff members.

Three typical staff meeting formats are briefly described below. In addition to these meetings, it is important that each teacher schedule regular meetings with his or her classroom assistant for feedback, discussion, and planning.

Faculty Meetings

The entire faculty meets regularly with the head to plan and to discuss their work. It is helpful to distribute an annual calendar of scheduled faculty meeting dates at the beginning of the year.

Publish an agenda several days before the meeting so that teachers come prepared for discussion. Involve faculty in developing the agenda. Keep managerial and business details to a minimum; many of those items can be effectively addressed in memo form. The primary work of faculty meetings involves faculty in discussion and requires careful facilitation. Although the head usually facilitates these meetings, experienced teachers can be trained to share this role. Discussion may be built around a specific activity or theme, such as problem solving around children with special needs or a discussion by subject area, reviewing and recording common needs. Meetings should conclude with a brief review of the meeting process, highlighting any decisions or action items that have been determined. Generally, faculty members rotate the responsibility for recording minutes, which are distributed within several days of the meeting.

Maximum faculty participation results in deeper exploration of ideas and greater enthusiasm for implementing plans. Particularly in schools with a large faculty, it is important to encourage all voices. Following are three techniques to enhance the group process:

- **Brainstorming** is built on free-flowing thought. The process escalates as ideas bump against ideas. To be effective, some ground rules must be established:
    - No criticism of ideas is allowed, nor repressive phrases such as "It could never work" or "That would never be allowed."
    - Stream of consciousness should be encouraged. Ideas build in relation to other ideas. Fluency is the medium of creative thinking.
    - The brainstorming session needs to be recorded. Write all ideas on a flip chart and display the pages throughout the room. Arrange the ideas into groups later.

- **Slip writing** is a modified form of brainstorming that uses slips of paper to avoid any upstaging. Everyone receives a pad of small slips of paper. The leader presents a problem in the form of a "how-to" statement. The participants write down as many answers to the question as possible, each on a single slip of paper.
- A **production timeline** shows the sequencing of the task ahead and when it needs to reach completion. A project enriched by ideas needs to be established in steps, clearly indicating who is responsible for each step and when each step is to be done.

Level Meetings

Level meetings involve the faculty of a particular developmental level (infant, preschool, elementary, adolescent). These groups focus on curriculum issues and plans specific to their level. Elementary faculty, for instance, often hold an annual meeting to discuss standardized achievement test scores and their implications for the program. The head will often be included in these meetings, but teachers are encouraged to take primary responsibility for leadership. Each level should give a brief summary report of their work at subsequent faculty meetings to help the staff develop a cohesive view of the school's program.

Whole Staff Meetings

Assistants and support staff are often "forgotten citizens" in the staff community. It is important to schedule into the annual calendar several meetings that include all staff in elements of planning, discussion, and celebration. Specific support staff members may also be invited to attend faculty meetings or level meetings.

Observations within the School

Observations of other classes within the school enhance both individual and program development. Observing outside one's own class encourages nonjudgmental perceptions about the behavior of children and provides impetus for reflection on one's own practice. Teachers should observe classes at all levels of the school to see the full developmental continuum. Observations should always be followed up with discussion. These observations provide a critical basis for schoolwide collaboration and program consensus.

In-Service Events

A variety of experiences within the school support staff development. Faculty should collaborate with the head in planning these events.

Staff Retreats

Occasional retreats enhance collegiality and encourage group reflection. Many schools schedule an annual retreat in an inviting setting that provides opportunities for playing and working together. An outside leader may be invited to provide a specific focus for the group.

STAFF MEETING CYCLE

Planning a staff meeting cycle makes it possible to integrate in-service meetings with business needs. Just as the teacher makes a lesson plan that isolates goals and objectives, the head of school sets up a meeting plan that sustains a steady enrichment level tied to the seasonal activities of the year. This list is not meant to be prescriptive but instead to give some ideas for variety in staff meeting themes.

Beginning-of-the-Year Meetings (August)

These are crucial to staff operations and should occur well before the first day of school. Here personnel procedures are reviewed, in-service programs are talked about, the parent mailing explained, and administrative improvements presented. A review of summer building and grounds accomplishments may be included.

Level Meetings: Orientation Procedures (September)

The head of school should meet with the teachers to discuss approaches to class orientation. Parent education plans for the year can also be laid out at this time. Ideally, parent education schedules are formulated in May and published in the school calendar for the following year. General reports on children with special needs should be resolved early so that the head can work out support strategies or auxiliary services with the classroom teachers.

In-Service Meetings (October)

In-service meetings can be tackled in a multitude of ways. The faculty and head of school might decide to choose a theme for the year—science in the classroom, parent education, practical life, special needs, or specific classroom problems. The heart of faculty relations is the ability to support each other's needs and development. An ongoing seminar with faculty doing the talking and choosing their in-service themes ensures a higher level of participation.

Schoolwide Celebrations (October-December)

Fall and winter holidays are seasonal opportunities for singing, dancing, artwork, storytelling, drama, games, and parties. Though sometimes requiring suspension of normal class functions, they always enhance school unity.

Parent Conferences (November)

Although there should be a scheduled set of parent conferences around this time, not all parent conferences should wait until mid-year. Discuss how to recognize the need for early parent conferences and how to handle them.

See Chapter 8 for a full discussion of parent-teacher conferences.

Teachers who wish to spread out their conferences for the sake of a more personal treatment begin their process at this time. It is important to stress good parent conference practices, scheduling procedures, duration, record keeping forms, and documentation.

Problem Solving (January, February, March)

Mid-February should be the last date for parent conference reports in order to clear the deck for the admissions process in March.

The staff learns to cooperate in problem solving by holding discussions on discipline, learning difficulties, or any issues suggested by staff. An outside facilitator can be helpful.

Admissions (March)

This is a good time to look at admissions for the next year, including predictions about attrition. Project class needs as to gender, age, and number of children, using temporary class lists of returning students. Review admissions procedures with staff.

Interface of Planes of Education (April)

Now is the time to discuss readiness to move from one age level to another and to begin observation exchanges, where children visit their prospective new classroom. This eases the transition for the children and allows staff time to anticipate special needs.

End-of-the-Year Procedures and Evaluation (May)

This is the time of year to formulate end-of-the-year procedures with the teachers. Teachers who are planners like to know ahead of time what is expected of them at the close of the year in terms of duties, inventory, cleanup, and evaluation.

Work Days

Scheduled work days bring the entire staff together to work on their environments. Informal visits to other classroom environments prompt sharing of ideas and resources and a group lunch provides opportunity for fellowship.

In-House Workshops

Workshops designed to focus on a specific theme provide new insights and stimulate sharing and collaboration among the staff. Invite an outside Montessori leader or a specialist from the local community to conduct a participatory workshop. Encourage experienced teachers on the staff to develop in-house workshops for classroom assistants.

Study Groups

Create small study groups among the staff. Directed readings are a good way to develop a focused discussion. Teachers may rotate as leaders, facilitating discussion by asking interpretive questions. Readings should be selected by the group. Other types of study groups may explore a specific aspect of child development or curriculum enhancement using directed discussion, outside observation, or a guest leader.

Although almost every Montessori book lends itself to directed readings, some recommended texts are *The Absorbent Mind, The Secret of Childhood, To Educate the Human Potential,* and *The Child in the Family*. Paula Polk Lillard's *Montessori: A Modern Approach* and E.M. Standing's *Maria Montessori: Her Life and Work* also make good readings.

Staff Celebrations

Celebrations are powerful forms of staff development. Rituals and celebrations highlight the values of the community. They provide opportunities to tell the evolving story of the school and to affirm the ongoing development of individuals within it.

Connecting to Opportunities for Professional Development

Teachers need opportunities for activities both inside and outside the school to help them more fully develop their professional potential. They should address the needs of the school as well as their personal need for growth. The head provides concrete support for these needs by incorporating funds for professional development into the annual operating budget. Beyond ensuring funding resources, the head seeks to connect individuals with opportunities related to their individual needs and stages of development. Sensitive encouragement by the head is sometimes necessary to foster a staff member's professional growth. Professional development relates to all the steps of the cycle of evaluative inquiry: observation, reflection, questioning, and action/decision.

WHOLE-SCHOOL GOAL SETTING THROUGH CONSENSUS

With the emerging complexities of larger schools, there is increasing need for opportunities to establish an overall vision of the developmental continuum. If the school is segmented by levels (0-3, 3-6, 6-9, 9-12, 12-14), teachers at each level may become preoccupied with objectives for their respective levels, losing sight of where the child is coming from and where the child is going. In a lecture entitled "On the Principles of the Montessori School," Maria Montessori argues for schools to consider not only the preparation of the child from one level to the next but also the interaction between the levels.[1]

The process of whole-school goal setting takes place over a series of staff meetings, following a series of steps whereby each teacher can shed boundaries and move across the continuum, discovering what happens to the child and learning the real implications of what each teacher does for the child's entire stay at the school:

1. The group comes together with the goal to establish their interconnectedness as a Montessori community.

2. The big picture can be developed by having faculty at each level present a view of one subject area. Each level, as a group, prepares a ten-minute summary of one area of study in preparation for a parent education meeting (language, mathematics, the psychology of the child, etc.). First they present to each other at a staff meeting, drawing out connections and explaining transitions from one level to the next. Then the parents are treated to a vision of constructive teamwork as they witness the teachers presenting the continuity of method and content for one subject area throughout the program.

3. At whole-school staff meetings, perhaps for three or four consecutive meetings, teachers share one presentation that they are most excited about with the whole staff. This has a warming effect and builds a sense of joy around the fact that each teacher is showing a part of him- or herself by the presentation chosen.

4. Once the climate is safe, already undergirded by the trust established between teacher and head, each level is requested to convene to discuss what they expect to see in the child coming into their level and what they expect to see in the child who is going out. This way of stating a question around "seeing" suggests that the teachers look at the whole child, that they describe psychological characteristics as well as academic achievement.

5. Once each level has determined together their entrance and exit visions of their particular level, they can now share with the levels that precede and follow theirs, comparing transition expectations. For example, the preschool faculty shares entry expectations with the admissions director and shares outgoing expectations with the lower elementary faculty. The elementary faculty compares incoming expectations with the outgoing expectations of the preschool faculty, negotiating a consensus. Decisions are made as to what the needs of the children are at the transition point. These character development goals and academic expectations are then listed and understood by each level. This process is carried on over all the school's age levels. Expectations by consensus may be placed on a grid, which shows how each individual child is progressing in certain skills. This provides the basis for whole-school evaluation and improves the goal setting at each respective level.

6. This whole process may take a faculty retreat and could be done at least once every three years so that the evolution of the school is an experience shared by all.

7. If the above steps are successful, then whole-vision evaluation can be orchestrated. For example, the preschool (3-6) teachers may notice that the children are not independent and seem to lack follow-through on their work. The lower elementary (6-9) teachers experience the lack of independence in their first-year students' ability to do research on their own. The upper elementary (9-12) teachers experience that students do not go into depth on their papers and researches. Across the continuum it has become evident that there are independence difficulties originating in the 3-6 classroom. Goal setting that arises out of vision, not out of complicity to strict mastery objectives, will motivate far better than on-paper management by objectives.

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[1] In *The Child, Society and the World: Unpublished Speeches and Writings*. Oxford: Clio, 1989.

Observation in Other Schools

Observations outside the school can be made by individuals or by a small group of staff members. These observations are further enhanced by opportunity for discussion with teachers in the other schools. Although most outside observations are made in Montessori classrooms, staff should also be encouraged to observe in other types of schools. Teachers benefit from occasional visits to schools attended by Montessori graduates or schools providing services for students with special needs.

Continuing Education

A developing teacher is a lifelong learner. Teacher education does not end with Montessori training. The head should expect all teachers to pursue continuing education and should provide funds to support their study.

See Appendix 4 for a list of Montessori associations offering membership and/or professional development opportunities.

The type of continuing education undertaken is related to the teacher's needs and interests. All teachers benefit from continued study of Montessori philosophy and pedagogy through regional workshops, national conferences, and refresher courses. Many schools provide all teachers with membership in national Montessori professional associations.

Many schools ask teachers to discuss plans for continuing education as part of their formal evaluation. When applying for school funding, teachers should develop a simple proposal outlining the plan and how it relates to their professional goals.

Continuing education in Montessori schools has many options. Montessori training is reinforced by "refresher" courses that go back to the root ideas of the materials. Most often in need of review are the language and cultural materials. For refresher purposes, teachers also might consider taking an additional training course for a different age level. This always provides a fresh perspective on Montessori educational principles while building a sense of the developmental continuum.

Modern developmental psychology (e.g. Mihaly Csikszentmihalyi's "flow" theory) provides new validation of Montessori theory. Educational reform, especially connected to geography and evolution, provides new insights into Cosmic Education at the elementary level. Howard Gardner's Multiple Intelligences has proven very interesting to Montessorians. Environmental education, including nature studies, sensitizes all Montessori teachers to the outdoor environment. Seminars about classroom management (including aspects of discipline), integration of creative arts and movement, special needs, all-day Montessori, dynamics of the learning community, and fundamentals of prepared environment design are always in demand. Recently a revival of interest in the spiritual and religious underpinnings of Montessori education has created some new ways to engage teachers and students. Technology, history, the humanities, and the sciences have also emerged as integrated disciplines to be understood in the context of world peace and human progress. The role of the adolescent in society and in the Montessori school is a rapidly expanding topic. Advanced degrees in special education, curriculum and instruction, research, and all classroom curriculum areas are sought after by Montessori teachers who understand the principle that they must learn in order to facilitate vital learning in young people.

Committee Involvement

Involvement in committee work provides opportunities for personal growth and contributes to the development of the school. Generally, new teachers are not expected to participate in committee work. Experienced teachers, however, are encouraged to contribute to planning efforts within the school and occasionally outside the school. The level of involvement is usually related to the teacher's own development. Less experienced teachers may be involved in planning a parent evening or a fundraising event, while seasoned teachers may be invited to develop a series of parent workshops or serve on the long-range planning committee.

Professional Leave

Experienced staff can make presentations at other schools and within the local community. Many schools involve faculty in presentations to high school and college classes. Seasoned faculty can also be encouraged to develop a workshop or presentation for a regional or national conference, serve as a consultant to other schools, or act as a mentor for a new teacher within the school. The head supports the development of experienced teachers by providing professional leave for these activities as needed.

Sabbatical

One of the best ways to enhance the development of seasoned teachers and to ensure long-term faculty commitment is to offer a sabbatical. A sabbatical experience provides opportunity for deep reflection, extended study, and renewal. Generally, a teacher submits a sabbatical proposal indicating the nature of proposed work during the sabbatical period and how this experience will enhance work in the classroom

For more information on sabbatical policies, see Chapter 10.

Formal Evaluation

When the school has created a climate of ongoing evaluation, formal evaluation becomes an additional way of engaging in evaluative inquiry, rather than the only evaluation experience during the year. Staff look forward to this evaluation as an invitation to discuss their own development within the context of the school.

Meaningful evaluation revolves around common values. In a Montessori school, staff evaluation examines how an individual's work and relationships exemplify the school's philosophy and contribute to the school's purpose. There is a fundamental assumption in Montessori schools that individuals want to perfect their abilities and will seek opportunities to enhance their own growth. In this context, individual self-evaluation is emphasized in the formal evaluation process. Self-evaluation is not tied to contract renewal or compensation.

A formal evaluation process should include the following steps:

- Prepare (generally in writing).
- Acknowledge areas of growth and success.
- Recognize challenges or areas to be improved.
- Reflect on the development of the children and the school.
- Determine individual goals and specific activities to accomplish those goals.

- Set a framework for support and accountability.
- Summarize the evaluation discussion in writing.

Evaluation with Faculty

A simple and effective evaluation tool is the self-evaluation questionnaire (see evaluation forms in this chapter's Sample Documents). The head asks the teacher to respond to a series of questions in writing. In a large school, the head may develop several different questionnaires to more sensitively address the needs of teachers at various stages of development. The head and teacher then meet to discuss the responses.

In a variation of this process, some heads also prepare comments for the teacher beforehand. The teacher and head read and reflect upon each other's comments prior to the scheduled meeting. This serves to decrease anxiety and helps to focus the discussion.

For information on personnel files and privacy, see Chapter 10.

Both teacher and head sign a written evaluation summary. This summary becomes part of the teacher's personnel file; a copy is also given to the teacher.

Evaluation with Support Staff

A similar self-evaluation process is recommended for evaluation of support staff. In the case of classroom assistants, the supervising teacher conducts the evaluation discussion. The head reviews all evaluation summaries.

Outside Evaluation/Consultation

Periodic evaluation conducted by an outside consultant is extremely beneficial to staff development. These evaluations are often connected to school affiliation or certification. However, the head may request outside evaluation at other times to focus on specific elements of the school's program. Evaluation by a consultant can be very effective in building staff consensus and providing affirmation for the school community. An outside evaluation usually includes a self-evaluation or school assessment component as part of the evaluation process.

Montessori associations often offer school consultation to their members.

Creating a Personal Example

The head leads by example in creating a climate of continuous evaluation. In all circumstances, the head models the cycle of evaluative inquiry: drawing out observations, encouraging reflection, asking key questions, soliciting proposals, and coordinating decisions and actions.

Evaluation of the Head

Evaluation of the head by the board should be ongoing, concerned with aspects of the school's operations. The head should also have an annual formal evaluation, independent of contract renewal or salary considerations. The annual evaluation is generally conducted by the executive committee or by a small group of board members appointed by the board.

The evaluation process for the head mirrors that of evaluation with faculty. A self-evaluation format provides the basis for discussion of achievements, areas of concern, and goal setting. Discussion should also include the board's own evaluation of its functions and relationship with the head. A written summary of the evaluation is provided to the full board.

Modeling Self-Evaluation

Although the board is responsible for evaluation of the head, the head sets a personal example of self-evaluation in his or her relationships with the staff. The head models the desire for self-perfection and openness to critique which is expected of all staff members. The head should periodically reflect on these questions:

- Does the staff see me set goals? Do they know the major goals I have discussed with the board? Can they discuss these goals with me?
- Do I regularly provide opportunities for input from the staff? Do they feel free to make requests, suggestions, and critiques?
- Am I open to questions and challenges from the staff?
- Do I communicate successes and occasional disappointments?
- Am I consistently seeking opportunities for growth?

Summary

Observation, reflection, questioning, and decision making build an organic growth based on cultivating insight through ongoing evaluation. As the teacher follows the child, so the head of school follows the teacher. Engaging in ongoing dialogue and written reflection is a pathway to the school's maturity.

Frequently Asked Questions

Our school cannot agree on common expectations across the planes of education. Some teachers wish to do their own thing and feel that any common ground is detrimental to free choice for their children's specific needs. Others are passive and do not participate in discussions.

If common goals are difficult to work out, then perhaps dialogue about presentations and successful use of the materials is another way to build toward a consensus path for the school. The most important aspect of goals is sharing, not evaluation of specific achievements mandated by grade level. Part of in-service is discussing ideas about how to connect children to the materials, how to improve the quality of the prepared environment through collaboration with other teachers, how to track the progress of children as they move up from one level to the next. After a while, consensus will be shaped by the school culture.

Some teachers may be too shy to share the needs or results of their classroom. They should never be forced to express their private concerns if they are not ready. Meeting in smaller groups by age level or by common interest in a topic may encourage quiet teachers to participate more.

If a teacher is overwhelmed, how does one get him or her back on the right path?

The first thing to do is to understand the teacher's personal stresses in the classroom. Within the workplace, stresses may occur around co-workers, an assistant, the head of school, or certain children, parents, or class combinations of children and parents. The first stage in encountering a teacher's overwhelmed feeling is to reserve judgment, meet with the teacher on the immediate sources of stress, and build plans to tackle each stress, one by one. When analysis is applied to a myriad of difficulties, and ways to implement solutions are put into writing, the problem seems more controlled and manageable–but this is only stage one.

If the teacher is open to finding solutions, the next step is to partner the teacher with a peer who can be there on a week-to-week basis–something that may not be possible for the head of school. A two-hour weekly session should be scheduled, wherein the teacher and the peer discuss such topics as small goals for helping specific children, lesson plans, parent relations, and yearly goals. The head should sit in on these weekly conferences whenever possible. On a quarterly basis, the teacher and head should meet to reflect on goals and successes, again breaking down problems step by step, emphasizing the improvements in the situation, comparing notes from previous meetings, and setting new goals.

Further Reading from NAMTA

The following articles and documents are available as photocopies from NAMTA. See Appendix 4 for ordering information.

"Cleveland Humanities and Education Institute Summers 1991-1992: Rationale." *The NAMTA Journal* 16.1 (1990-91, Fall-Winter): 122-142. 11 total pages.

Delattre, Edwin J. "The Intellectual Lives of Teachers." *The NAMTA Journal* 18.1 (1993, Winter): 107-128. Reprinted from *Against Mediocrity: The Humanities in America's High Schools*, ed. by Chester E. Finn, Diane Ravitch, and Robert T. Fancher.

Hall, Elizabeth. "The Professional Development of the Montessori Teacher." *The NAMTA Quarterly* 6.3 (1981, Summer): 10-13. 2 total pages.

Kahn, David. "Teacher Discussion Groups: Insight and Referral." Interview with Robert Furman. *The NAMTA Quarterly* 8.1 (1983, Winter): 30-36. 4 total pages.

Kahn, David. "Training, the Teacher, and Praxis." *The NAMTA Quarterly* 6.3 (1981, Summer): 1-4. 3 total pages.

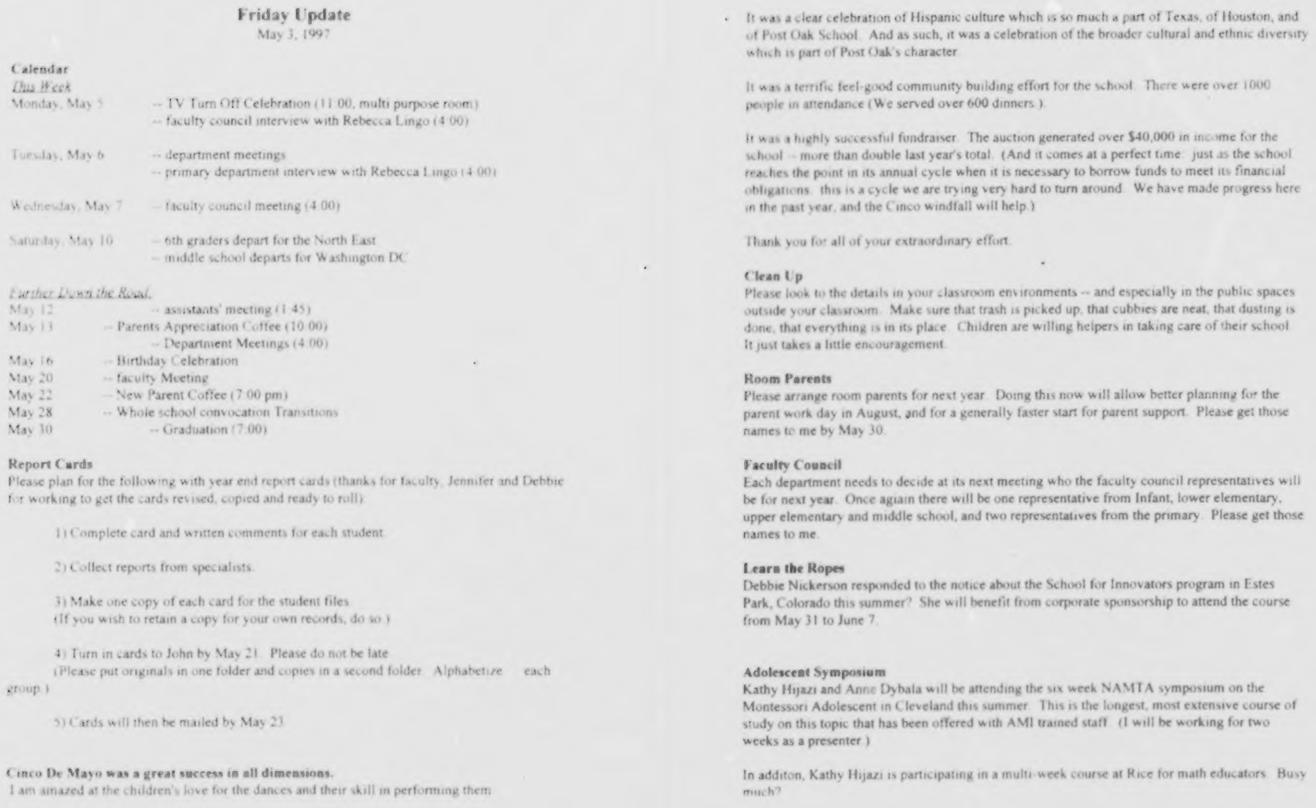
Redmond, Sandra Louise. "Evaluation of the Child Study Group: Psychoanalytic Consultation with Preschool Teachers." *The NAMTA Quarterly* 4.1-2 (1978-79, Fall/Winter): 48-51. 3 total pages.

Trochta, Charlene S. "The Professional Montessorian: An Examination of Conscience." *The NAMTA Quarterly* 6.3 (1981, Summer): 5-9. 3 total pages.

Sample Documents

The following documents illustrate common practices in Montessori school operations. To view documents at full size, photocopy and enlarge.

In-House Bulletin, The Post Oak School (Bellaire, TX)



Friday Update

May 3, 1997

Calendar

This Week

Monday, May 5 -- TV Turn Off Celebration (11:00, multi purpose room)
-- faculty council interview with Rebecca Lingo (4:00)

Tuesday, May 6 -- department meetings
-- primary department interview with Rebecca Lingo (4:00)

Wednesday, May 7 -- faculty council meeting (4:00)

Saturday, May 10 -- 6th graders depart for the North East
-- middle school departs for Washington DC

Further Down the Road.

May 12 -- assistants' meeting (1:45)
May 13 -- Parents Appreciation Coffee (10:00)
-- Department Meetings (4:00)
May 16 -- Birthday Celebration
May 20 -- faculty Meeting
May 22 -- New Parent Coffee (7:00 pm)
May 28 -- Whole school convocation Transitions
May 30 -- Graduation (7:00)

Report Cards

Please plan for the following with year end report cards (thanks for faculty, Jennifer and Debbie for working to get the cards revised, copied and ready to roll):

1) Complete card and written comments for each student.

2) Collect reports from specialists.

3) Make one copy of each card for the student files.
(If you wish to retain a copy for your own records, do so.)

4) Turn in cards to John by May 21. Please do not be late.
(Please put originals in one folder and copies in a second folder. Alphabetize each group.)

5) Cards will then be mailed by May 23.

Cinco De Mayo was a great success in all dimensions.

I am amazed at the children's love for the dances and their skill in performing them.

- It was a clear celebration of Hispanic culture which is so much a part of Texas, of Houston, and of Post Oak School. And as such, it was a celebration of the broader cultural and ethnic diversity which is part of Post Oak's character.

It was a terrific feel-good community building effort for the school. There were over 1000 people in attendance (We served over 600 dinners.)

It was a highly successful fundraiser. The auction generated over $40,000 in income for the school -- more than double last year's total. (And it comes at a perfect time: just as the school reaches the point in its annual cycle when it is necessary to borrow funds to meet its financial obligations. this is a cycle we are trying very hard to turn around. We have made progress here in the past year, and the Cinco windfall will help.)

Thank you for all of your extraordinary effort.

Clean Up

Please look to the details in your classroom environments -- and especially in the public spaces outside your classroom. Make sure that trash is picked up, that cubbies are neat, that dusting is done, that everything is in its place. Children are willing helpers in taking care of their school. It just takes a little encouragement.

Room Parents

Please arrange room parents for next year. Doing this now will allow better planning for the parent work day in August, and for a generally faster start for parent support. Please get those names to me by May 30.

Faculty Council

Each department needs to decide at its next meeting who the faculty council representatives will be for next year. Once agiain there will be one representative from Infant, lower elementary, upper elementary and middle school, and two representatives from the primary. Please get those names to me.

Learn the Ropes

Debbie Nickerson responded to the notice about the School for Innovators program in Estes Park, Colorado this summer? She will benefit from corporate sponsorship to attend the course from May 31 to June 7.

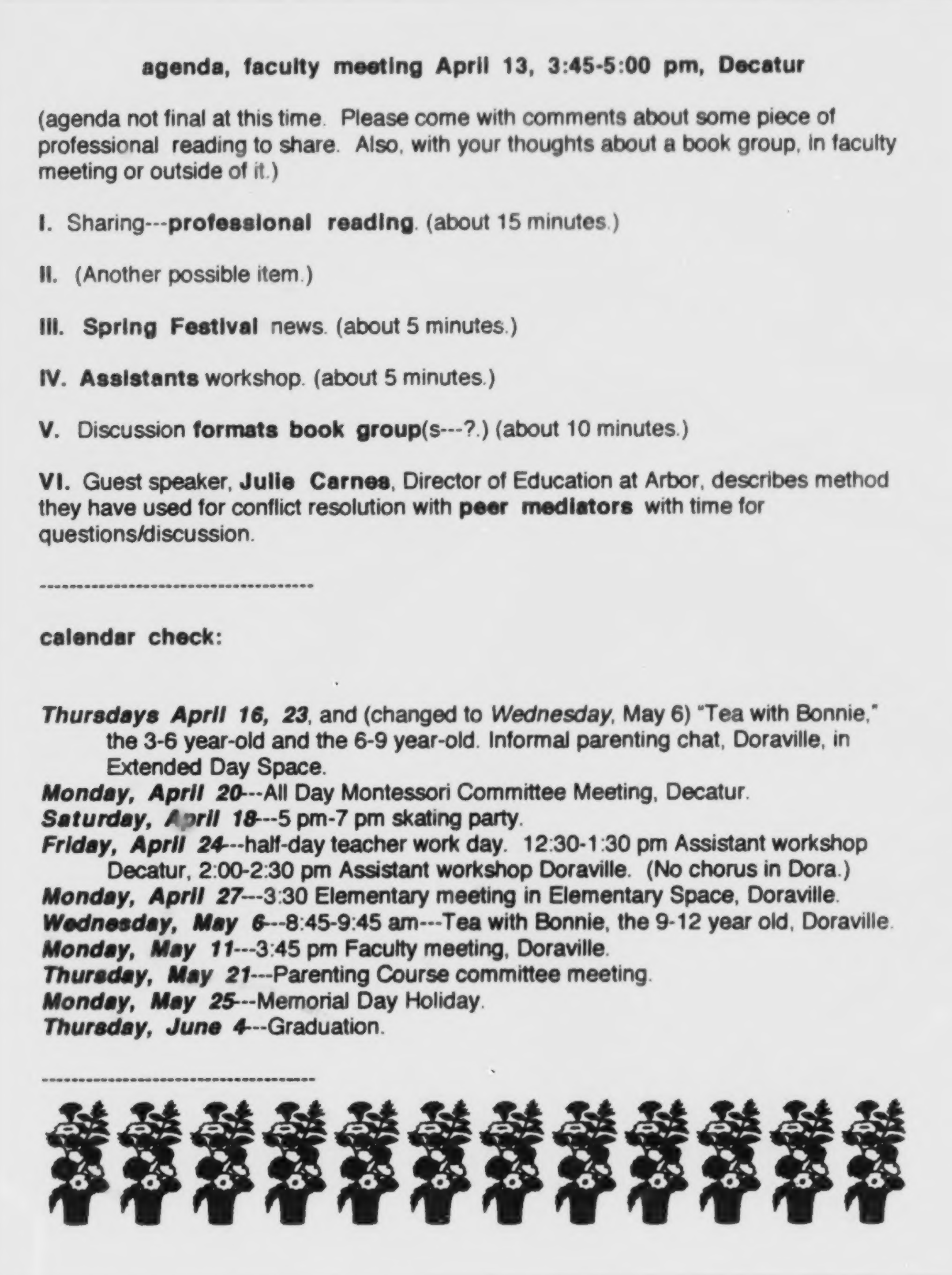
Adolescent Symposium

Kathy Hijazi and Anne Dybala will be attending the six week NAMTA symposium on the Montessori Adolescent in Cleveland this summer. This is the longest, most extensive course of study on this topic that has been offered with AMI trained staff. (I will be working for two weeks as a presenter.)

In additon, Kathy Hijazi is participating in a multi-week course at Rice for math educators. Busy much?

In-house staff bulletins communicate managerial details and keep the community informed about staff news

Faculty Meeting Agenda, Northwoods Montessori School (Atlanta, GA)



agenda, faculty meeting April 13, 3:45-5:00 pm, Decatur

(agenda not final at this time. Please come with comments about some piece of professional reading to share. Also, with your thoughts about a book group, in faculty meeting or outside of it.)

I. Sharing---**professional reading**. (about 15 minutes.)

II. (Another possible item.)

III. Spring Festival news. (about 5 minutes.)

IV. Assistants workshop. (about 5 minutes.)

V. Discussion **formats book group**(s---?.) (about 10 minutes.)

VI. Guest speaker, **Julie Carnes**, Director of Education at Arbor, describes method they have used for conflict resolution with **peer mediators** with time for questions/discussion.

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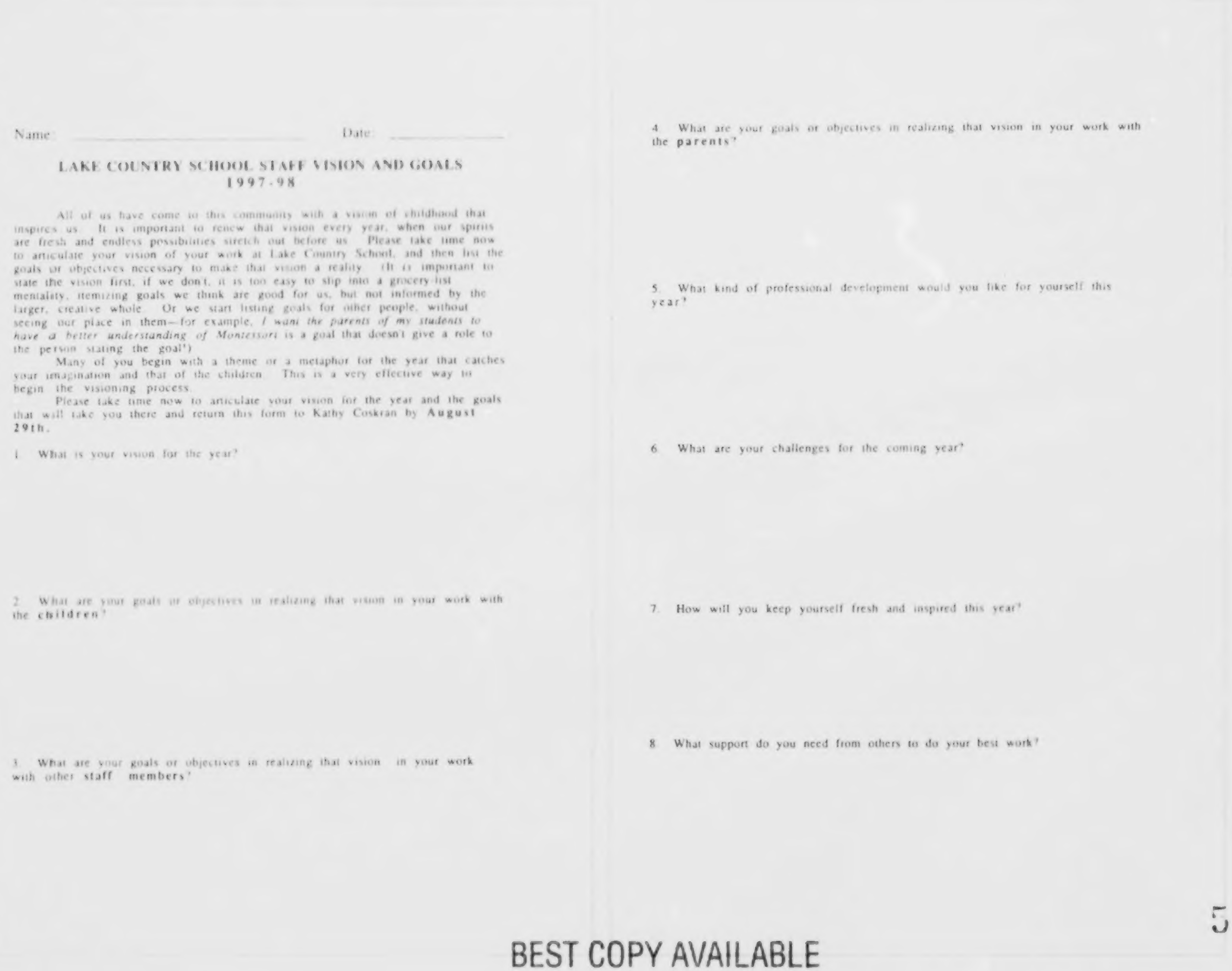
calendar check:

Thursdays April 16, 23, and (changed to *Wednesday*, May 6) "Tea with Bonnie," the 3-6 year-old and the 6-9 year-old. Informal parenting chat, Doraville, in Extended Day Space.
Monday, April 20---All Day Montessori Committee Meeting, Decatur.
Saturday, April 18---5 pm-7 pm skating party.
Friday, April 24---half-day teacher work day. 12:30-1:30 pm Assistant workshop Decatur, 2:00-2:30 pm Assistant workshop Doraville. (No chorus in Dora.)
Monday, April 27---3:30 Elementary meeting in Elementary Space, Doraville.
Wednesday, May 6---8:45-9:45 am---Tea with Bonnie, the 9-12 year old, Doraville.
Monday, May 11---3:45 pm Faculty meeting, Doraville.
Thursday, May 21---Parenting Course committee meeting.
Monday, May 25---Memorial Day Holiday.
Thursday, June 4---Graduation.

An agenda for a teacher's meeting that shows respect and care, encouraging teachers to prepare for faculty meetings.

Vision and Goals Questionnaire, Lake Country School (Minneapolis, MN)



Name: __________________ Date: __________

LAKE COUNTRY SCHOOL STAFF VISION AND GOALS
1997-98

All of us have come to this community with a vision of childhood that inspires us. It is important to renew that vision every year, when our spirits are fresh and endless possibilities stretch out before us. Please take time now to articulate your vision of your work at Lake Country School, and then list the goals or objectives necessary to make that vision a reality. (It is important to state the vision first; if we don't, it is too easy to slip into a grocery-list mentality, itemizing goals we think are good for us, but not informed by the larger, creative whole. Or we start listing goals for other people, without seeing our place in them—for example, *I want the parents of my students to have a better understanding of Montessori* is a goal that doesn't give a role to the person stating the goal!)

Many of you begin with a theme or a metaphor for the year that catches your imagination and that of the children. This is a very effective way to begin the visioning process.

Please take time now to articulate your vision for the year and the goals that will take you there and return this form to Kathy Coskran by **August 29th**.

1. What is your vision for the year?

2. What are your goals or objectives in realizing that vision in your work with the **children**?

3. What are your goals or objectives in realizing that vision in your work with other **staff members**?

4. What are your goals or objectives in realizing that vision in your work with the **parents**?

5. What kind of professional development would you like for yourself this year?

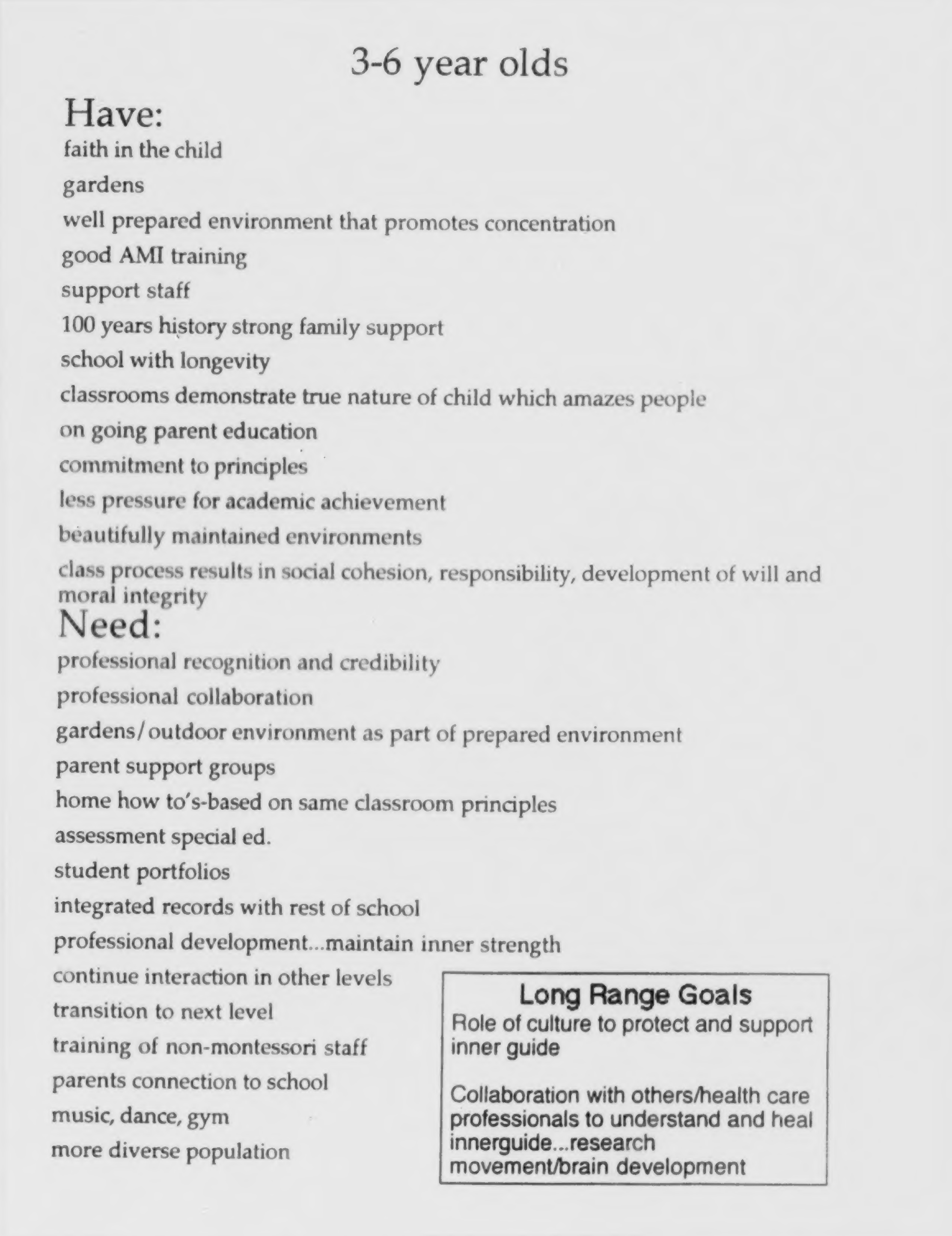
6. What are your challenges for the coming year?

7. How will you keep yourself fresh and inspired this year?

8. What support do you need from others to do your best work?

A consensus-building starter for the school year, this form provides an occasion for goal setting as a community.

Notes from Consensus Meetings, Pacific Crest School (Seattle, WA)



3-6 year olds

Have:

faith in the child
gardens
well prepared environment that promotes concentration
good AMI training
support staff
100 years history strong family support
school with longevity
classrooms demonstrate true nature of child which amazes people
on going parent education
commitment to principles
less pressure for academic achievement
beautifully maintained environments
class process results in social cohesion, responsibility, development of will and moral integrity

Need:

professional recognition and credibility
professional collaboration
gardens/outdoor environment as part of prepared environment
parent support groups
home how to's-based on same classroom principles
assessment special ed.
student portfolios
integrated records with rest of school
professional development...maintain inner strength
continue interaction in other levels
transition to next level
training of non-montessori staff
parents connection to school
music, dance, gym
more diverse population

Long Range Goals

Role of culture to protect and support inner guide

Collaboration with others/health care professionals to understand and heal innerguide...research movement/brain development

Consensus building among school staff can address varied needs at different age levels, not just academic needs.

Notes from Consensus Meetings, Pacific Crest School (continued)

6-9 year olds

Have:

well equipped classroom
good AMI training
gardens
50 year history
parent support
materials leading to concentration
plants and animals
esthetically prepared environment
space for large work
library-content with at this point
philosophy intact

Need:

See 3-6 year olds...all pertains here too
Social development on going process
Practical life-preparation for going out
More computer equipment
Space for drama--theater
Social organization
Assessment process
Natural environment(Add this to 3-6 too)
Work with primary staff
Facilitate transitions of primary students

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9-12 year olds

Have:

Need:

Opportunities for going out
Van
More storage/portfolios/artwork
Timelines incorrect. Need to be updated.
Transition from concrete to abstract (6-9/9-12) gets fuzzy
Clear outline of passage from concrete to abstract...what materials to utilize? computers? books? curriculum? Moving into computer era where information is more appropriate than traditional montessori handmade materials

What is working, what is not?

The album was not complete. Pieces there but gaps. Need a process to examine curriculum

Need examination with knowledge, support, thoughtfully to review upper elementary curriculum...an avenue to share our conclusions

Collaboration with other staff in country/region to look at gaps in curriculum...work together to finish work at this level regarding development of method

What marks third level in primary to parallel third level in elementary?..Now it is unfinished in second period...adolescent is still in first period

Work with sixth grade staff

Long Range Goals:

What is best way to meet the needs of this age group...must evaluate and develop...Still a huge debate within professional community

002

Notes from Consensus Meetings, Pacific Crest School (continued)

12-14 years of age

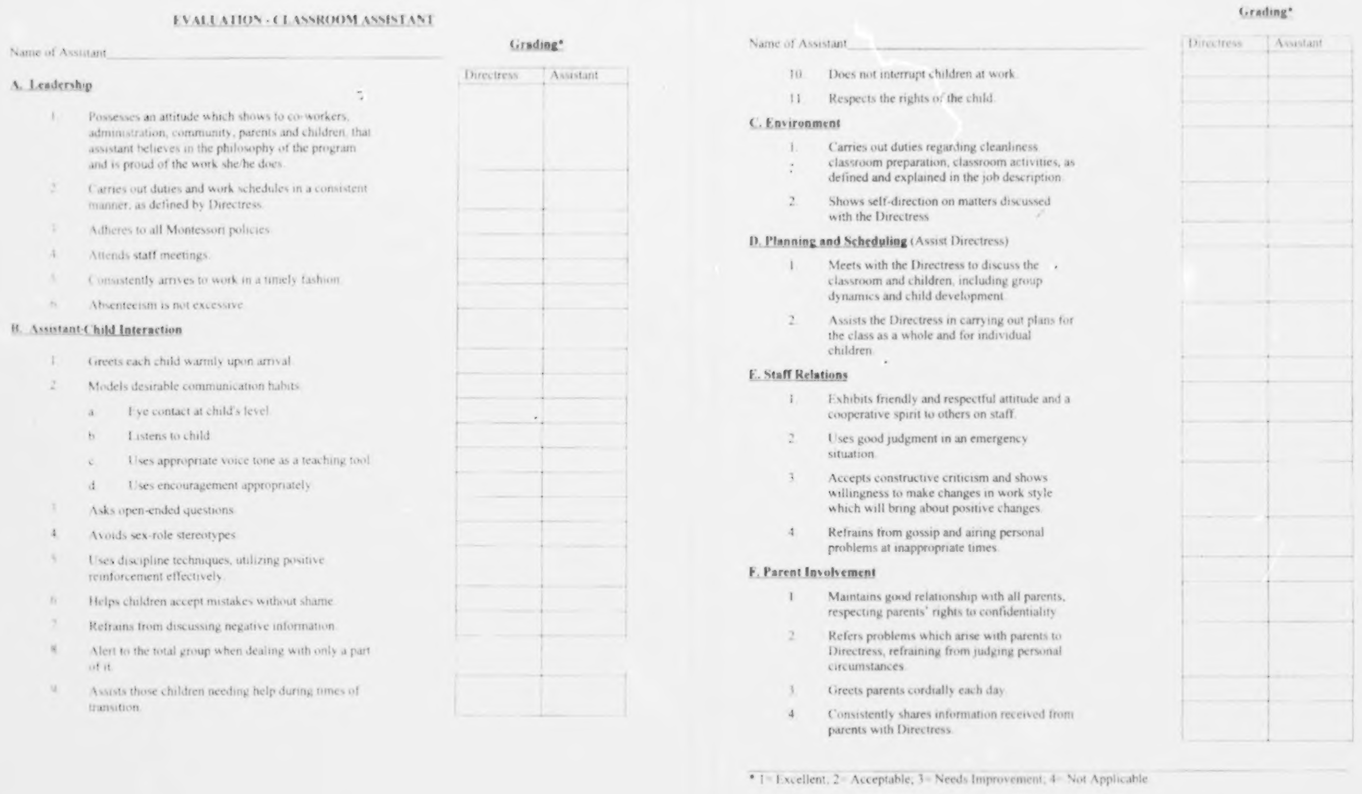
HAVE:

freedom to create and problem solve
work which manifests as engagement, concentration, flow
respect
community projects, outreach, next level of going out
social community
mixed age group
chance to define work of adolescent as different from other ages
opportunities for self expression
beginning computer lab
assembled strong faculty
commitment to process of learning
potential for real work
understanding needs of young adolescent
student work period
time management/records
opportunities for self assessment
leadership/ownership
always try to provide student choice/input
student choice/voice/freedom
work ethic-set challenge for self, still have pleasure in this...seems to get higher each year...most often observed in setting up culture/creating culture
manifestation of work is different at each level

NEEDS:

take out sheet on tendencies and planes of development
see chart of developmental needs
what is the core? (elementary has "cosmic ed"..erdkinder might be outline for core transposed to urban model)
"great lessons" from elementary become "the great ideas"
stable human relationships
land and urban center for work so they look alike
space to hang out/create culture
vans
land
camping equipment
dog poop free park
curriculum arrived through interest/student centered and through work-more science equipment... "prepared environment" for science work
music
grant writer/cash
reflection/process time/articulate priorities-need summer grants to pay staff to do this
on going documentation of the work-teachers as researchers
experimental process/method
collaboration with others

Evaluation, Classroom Assistant, Montessori Center of Oak Ridge (Oak Ridge, TN)



EVALUATION - CLASSROOM ASSISTANT

Name of Assistant____________________________

			Grading*	
			Directress	Assistant
A. Leadership				
1	Possesses an attitude which shows to co-workers, administration, community, parents and children, that assistant believes in the philosophy of the program and is proud of the work she/he does.			
2	Carries out duties and work schedules in a consistent manner, as defined by Directress.			
3	Adheres to all Montessori policies.			
4	Attends staff meetings.			
5	Consistently arrives to work in a timely fashion.			
6	Absenteeism is not excessive.			
B. Assistant-Child Interaction				
1	Greets each child warmly upon arrival.			
2	Models desirable communication habits.			
	a	Eye contact at child's level.		
	b	Listens to child.		
	c	Uses appropriate voice tone as a teaching tool.		
	d	Uses encouragement appropriately.		
3	Asks open-ended questions.			
4	Avoids sex-role stereotypes.			
5	Uses discipline techniques, utilizing positive reinforcement effectively.			
6	Helps children accept mistakes without shame.			
7	Refrains from discussing negative information.			
8	Alert to the total group when dealing with only a part of it.			
9	Assists those children needing help during times of transition.			

Name of Assistant____________________________

		Grading*	
		Directress	Assistant
10	Does not interrupt children at work.		
11	Respects the rights of the child.		
C. Environment			
1.	Carries out duties regarding cleanliness classroom preparation, classroom activities, as defined and explained in the job description.		
2.	Shows self-direction on matters discussed with the Directress.		
D. Planning and Scheduling (Assist Directress)			
1	Meets with the Directress to discuss the classroom and children, including group dynamics and child development.		
2.	Assists the Directress in carrying out plans for the class as a whole and for individual children.		
E. Staff Relations			
1	Exhibits friendly and respectful attitude and a cooperative spirit to others on staff.		
2	Uses good judgment in an emergency situation.		
3	Accepts constructive criticism and shows willingness to make changes in work style which will bring about positive changes.		
4	Refrains from gossip and airing personal problems at inappropriate times.		
F. Parent Involvement			
1	Maintains good relationship with all parents, respecting parents' rights to confidentiality.		
2	Refers problems which arise with parents to Directress, refraining from judging personal circumstances.		
3	Greets parents cordially each day.		
4	Consistently shares information received from parents with Directress.		

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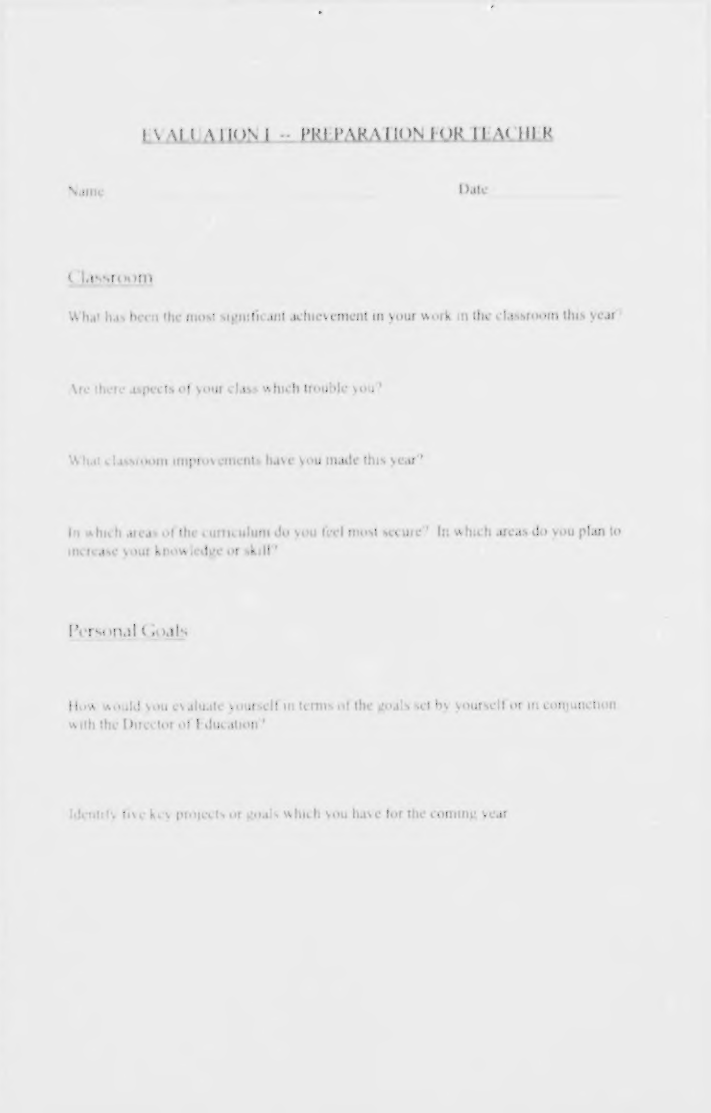
* 1= Excellent; 2= Acceptable; 3= Needs Improvement; 4= Not Applicable

The teacher and assistant each record their evaluations prior to meeting for discussion

Teacher Evaluation, Northwoods Montessori School (Atlanta, GA)



EVALUATION I -- PREPARATION FOR TEACHER

Name Date

Classroom

What has been the most significant achievement in your work in the classroom this year?

Are there aspects of your class which trouble you?

What classroom improvements have you made this year?

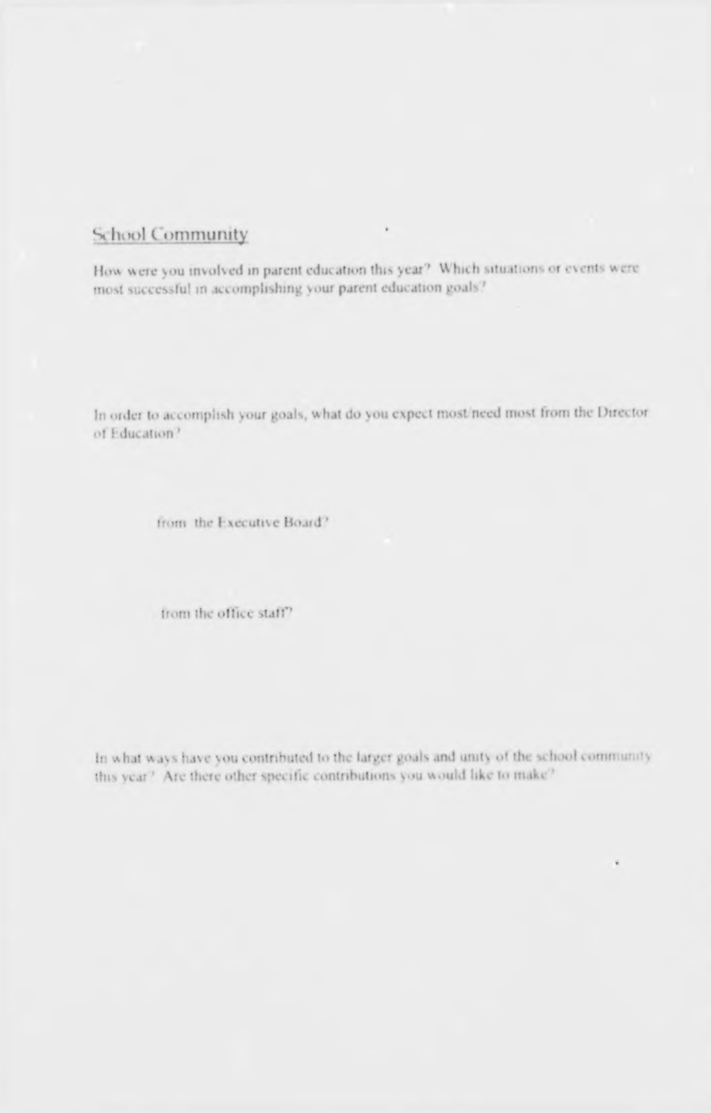
In which areas of the curriculum do you feel most secure? In which areas do you plan to increase your knowledge or skill?

Personal Goals

How would you evaluate yourself in terms of the goals set by yourself or in conjunction with the Director of Education?

Identify five key projects or goals which you have for the coming year

007



School Community

How were you involved in parent education this year? Which situations or events were most successful in accomplishing your parent education goals?

In order to accomplish your goals, what do you expect most/need most from the Director of Education?

from the Executive Board?

from the office staff?

In what ways have you contributed to the larger goals and unity of the school community this year? Are there other specific contributions you would like to make?

008

Teacher and head share written comments prior to the evaluation session. This approach helps to focus the discussion.

Teacher Evaluation, Northwoods Montessori School (continued)

EVALUATION COMMENTS II - PREPARED BY ADMINISTRATOR

Teacher's Name ________________

Evaluation Period ________________

- In what area (s) has the teacher demonstrated professional growth during this year?

- Evaluate the teacher's progress toward goals established during the previous evaluation?

- What suggestions, requests, or recommendations would you make? List any specific requirements

- Evaluate the teacher's role in the context of the wider school community.

- Comment upon the following areas

  Care of the environment

  Professional conduct

  Commitment

  Relations with parents

  Problem-solving/Conflict resolution

Teacher Evaluation, Lake Country School (Minneapolis, MN)

This evaluation form is filled out by both the teacher and the head in preparation for an evaluation conference.

Lake Country School Evaluation Touchstones
Montessori Trained Staff

Name: ______________________ Date: ____________

This evaluation form is meant to supplement your own articulation of your vision and goals for yourself. There are many areas of responsibility listed here in order to give you and the principal a reminder of the many-faceted nature of the task of working with children. The areas to be evaluated can't possibly cover everything that you do, but they can serve as a basis for talking about your year with the children. Please ignore anything that doesn't apply to you and add anything that you think is significant but not listed here. Also feel free to make comments rather than using the suggested language or numbers. The "Evaluation Possibilities" are meant to give an idea of the scope of the evaluation rather than to limit or define it.

The goal is to facilitate meaningful self- and peer-evaluation without limiting or prejudging. Thank you for participating in this new process.

Evaluation Possibilities--Self	**Evaluation -Administration**
1. This is a strength for me.	1. This is a strength for you; your work is outstanding.
2. Things are going well in this area.	2. You are doing well in this area.
3. "I am working on this area and expect to improve.	3. This is an area that needs improvement.
4. This is a real challenge for me.	4. This is a significant challenge for you.

Montessori classroom responsibilities.

Community of Children:

I establish a relationship with each child. I am aware of each child's developmental processes and learning style.

I give appropriate and timely presentations of Montessori materials.

I observe individual children and the community of children at least once daily.

I protect the privacy and working atmosphere of the community of children at all times.

I have established and put into practice a conflict resolution process for the community of children.

Environment

I maintain an environment in which the furnishings and Montessori materials are complete and correspond to the needs of the children.

I am responsible for the care and maintenance of classroom materials, i.e., I maintain an orderly environment and keep it clean and in like-new condition.

Staff and Professional Responsibilities

I set aside a regular time weekly to communicate with co-directress and/or specialists.

I coordinate and integrate the work of the specialists in the classroom.

I attend staff meetings, staff potlucks, parent education meetings, one open-house, the annual staff retreat and any special meetings requested by the principal.

I understand and exhibit a professional manner.

I attend at least one pre-planned, professional development conference or workshop year.

I am achieving the vision and objectives I set at the beginning of the year.

Parents

I maintain current records on each child and hold two conferences yearly with the parents.

I seek to maintain open communication and establish a partnership with parents.

I participate in parent education opportunities.

I work with room parents to support the class.

Administration

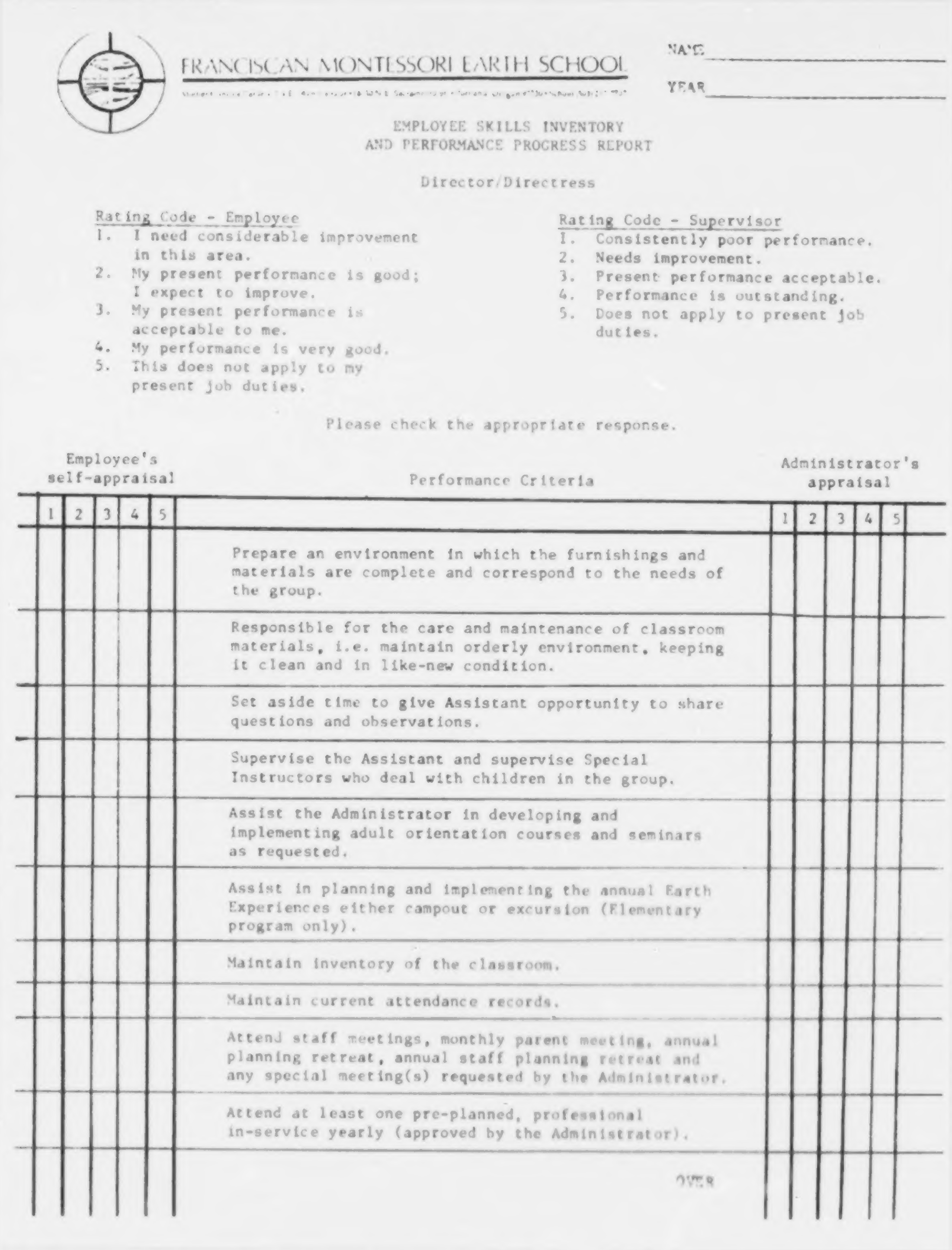
I alert the level coordinator and/or the principal immediately of difficulties with children their parents, or staff.

I report any and all accidents to the office at once. Prepare a written report stating date, time, nature of accident, and action taken.

I maintain an inventory of the classroom.

I maintain current attendance records and submit student records as requested to the office in a timely manner at the end of the school year.

Teacher Evaluation, Franciscan Montessori Earth School (Portland, OR)



FRANCISCAN MONTESSORI EARTH SCHOOL

NAME ____________________

YEAR ____________________

EMPLOYEE SKILLS INVENTORY
AND PERFORMANCE PROGRESS REPORT

Director/Directress

Rating Code - Employee

1. I need considerable improvement in this area.
2. My present performance is good; I expect to improve.
3. My present performance is acceptable to me.
4. My performance is very good.
5. This does not apply to my present job duties.

Rating Code - Supervisor

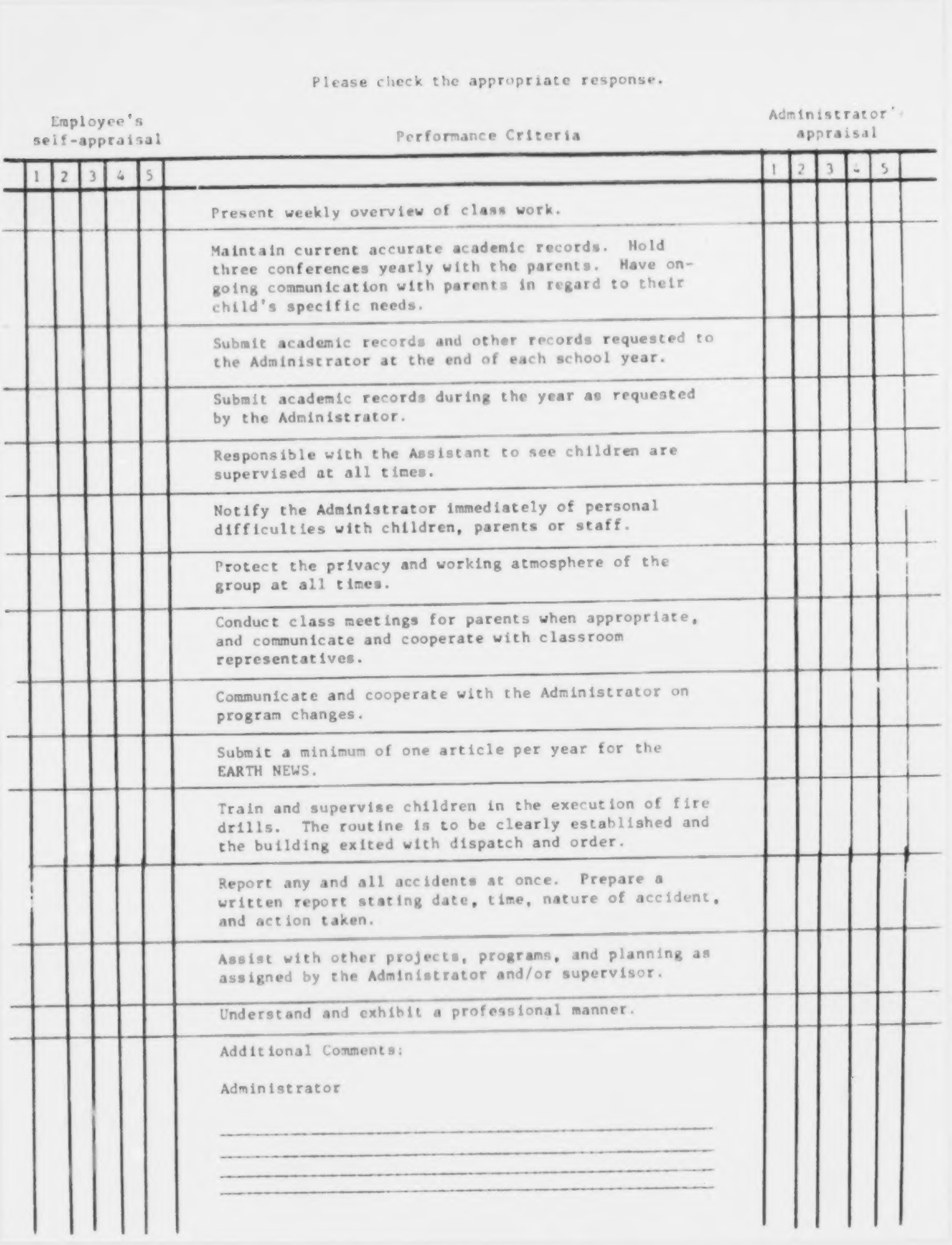
1. Consistently poor performance.
2. Needs improvement.
3. Present performance acceptable.
4. Performance is outstanding.
5. Does not apply to present job duties.

Please check the appropriate response.

Employee's self-appraisal					Performance Criteria	Administrator's appraisal				
1	2	3	4	5		1	2	3	4	5
					Prepare an environment in which the furnishings and materials are complete and correspond to the needs of the group.					
					Responsible for the care and maintenance of classroom materials, i.e. maintain orderly environment, keeping it clean and in like-new condition.					
					Set aside time to give Assistant opportunity to share questions and observations.					
					Supervise the Assistant and supervise Special Instructors who deal with children in the group.					
					Assist the Administrator in developing and implementing adult orientation courses and seminars as requested.					
					Assist in planning and implementing the annual Earth Experiences either campout or excursion (Elementary program only).					
					Maintain inventory of the classroom.					
					Maintain current attendance records.					
					Attend staff meetings, monthly parent meeting, annual planning retreat, annual staff planning retreat and any special meeting(s) requested by the Administrator.					
					Attend at least one pre-planned, professional in-service yearly (approved by the Administrator).					
					OVER					

This form, reprinted from NAMTA's 1988 *A Montessori Operations Handbook*, documents the successful fulfillment of the non-pedagogical aspects of the teacher's job description.

Teacher Evaluation, Franciscan Montessori Earth School (continued)



Please check the appropriate response.

Employee's self-appraisal					Performance Criteria	Administrator's appraisal				
1	2	3	4	5		1	2	3	4	5
					Present weekly overview of class work.					
					Maintain current accurate academic records. Hold three conferences yearly with the parents. Have on-going communication with parents in regard to their child's specific needs.					
					Submit academic records and other records requested to the Administrator at the end of each school year.					
					Submit academic records during the year as requested by the Administrator.					
					Responsible with the Assistant to see children are supervised at all times.					
					Notify the Administrator immediately of personal difficulties with children, parents or staff.					
					Protect the privacy and working atmosphere of the group at all times.					
					Conduct class meetings for parents when appropriate, and communicate and cooperate with classroom representatives.					
					Communicate and cooperate with the Administrator on program changes.					
					Submit a minimum of one article per year for the EARTH NEWS.					
					Train and supervise children in the execution of fire drills. The routine is to be clearly established and the building exited with dispatch and order.					
					Report any and all accidents at once. Prepare a written report stating date, time, nature of accident, and action taken.					
					Assist with other projects, programs, and planning as assigned by the Administrator and/or supervisor.					
					Understand and exhibit a professional manner.					
					Additional Comments: Administrator ____________________ ____________________ ____________________ ____________________					

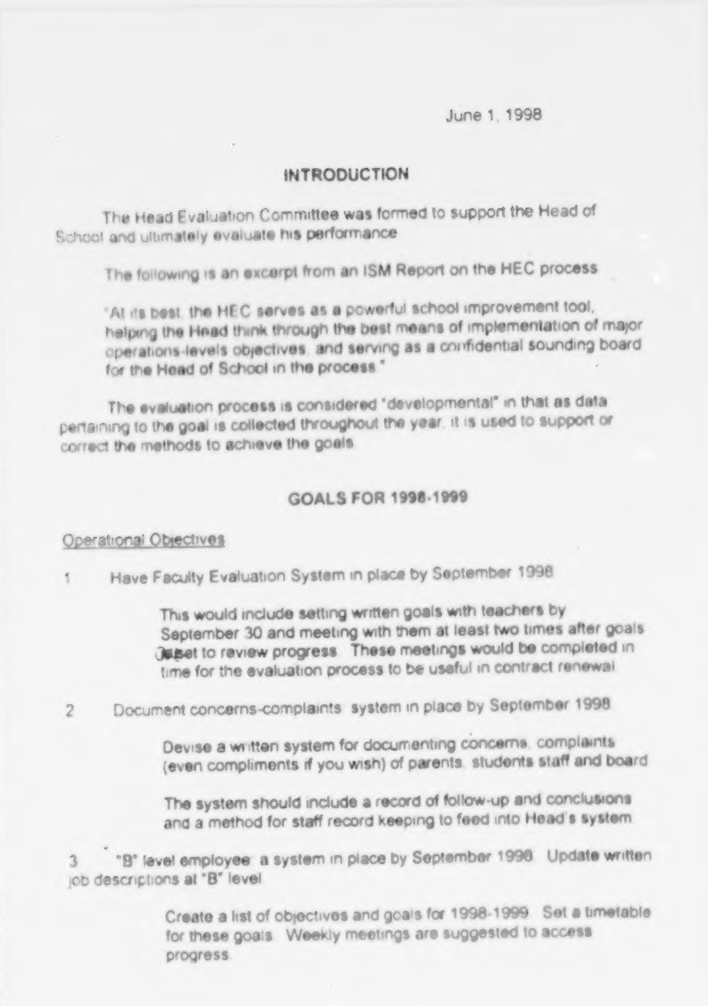
Teacher Evaluation, Franciscan Montessori Earth School (continued)

Please check the appropriate response.

Employee's self-appraisal					Performance Criteria	Administrator's appraisal				
1	2	3	4	5		1	2	3	4	5
					Director/Directress ________________ ________________ ________________ ________________					

Head of School Evaluation, Ruffing Montessori School East (Cleveland Heights, OH)

This process evaluates the head by goals and objectives agreed upon by the head and the head evaluation committee of the board.



June 1, 1998

INTRODUCTION

The Head Evaluation Committee was formed to support the Head of School and ultimately evaluate his performance

The following is an excerpt from an ISM Report on the HEC process

"At its best, the HEC serves as a powerful school improvement tool, helping the Head think through the best means of implementation of major operations-levels objectives, and serving as a confidential sounding board for the Head of School in the process."

The evaluation process is considered "developmental" in that as data pertaining to the goal is collected throughout the year, it is used to support or correct the methods to achieve the goals

GOALS FOR 1998-1999

Operational Objectives

1 Have Faculty Evaluation System in place by September 1998

This would include setting written goals with teachers by September 30 and meeting with them at least two times after goals are set to review progress. These meetings would be completed in time for the evaluation process to be useful in contract renewal

2 Document concerns-complaints system in place by September 1998

Devise a written system for documenting concerns, complaints (even compliments if you wish) of parents, students staff and board

The system should include a record of follow-up and conclusions and a method for staff record keeping to feed into Head's system

3 "B" level employee: a system in place by September 1998. Update written job descriptions at "B" level

Create a list of objectives and goals for 1998-1999. Set a timetable for these goals. Weekly meetings are suggested to access progress

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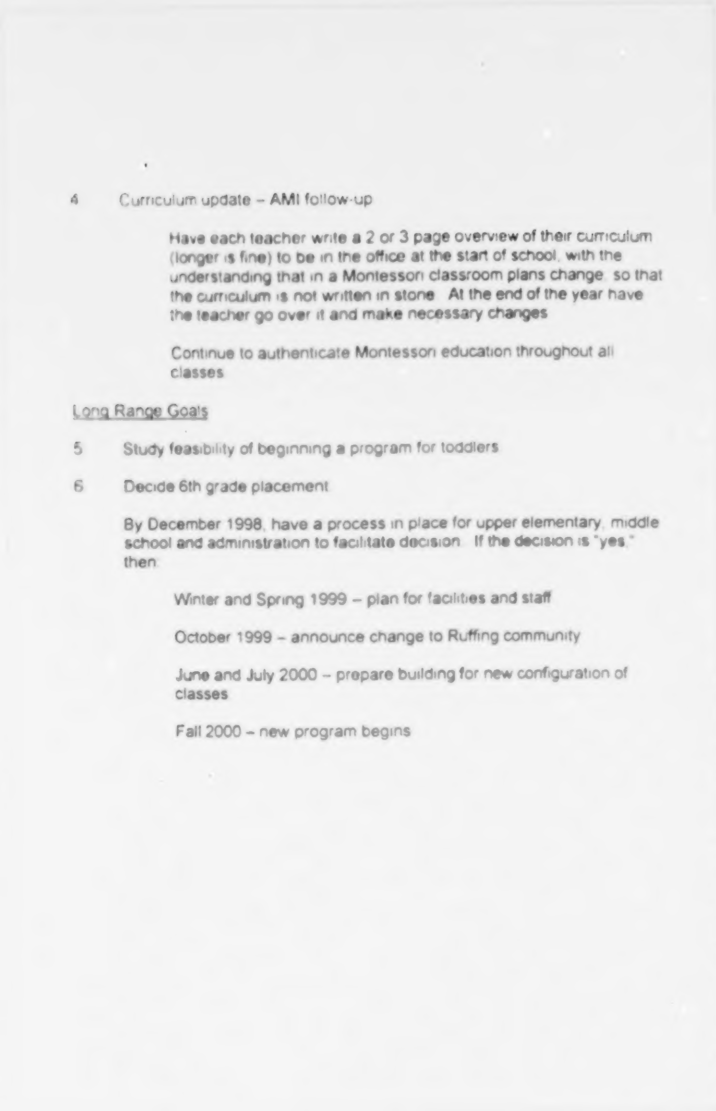


4 Curriculum update – AMI follow-up

Have each teacher write a 2 or 3 page overview of their curriculum (longer is fine) to be in the office at the start of school, with the understanding that in a Montessori classroom plans change, so that the curriculum is not written in stone. At the end of the year have the teacher go over it and make necessary changes

Continue to authenticate Montessori education throughout all classes

Long Range Goals

5 Study feasibility of beginning a program for toddlers

6 Decide 6th grade placement

By December 1998, have a process in place for upper elementary, middle school and administration to facilitate decision. If the decision is "yes," then:

Winter and Spring 1999 – plan for facilities and staff

October 1999 – announce change to Ruffing community

June and July 2000 – prepare building for new configuration of classes

Fall 2000 – new program begins

017

Stages of Development in Teachers

by Sharon L. Dubble, PhD

This model of developmental stages for teachers is influenced by the work of Lilian Platz on teacher development, Malcolm Knowles on adult learning, and numerous interviews with Montessori teachers, heads of school, and teacher trainers.

Every Montessori teacher is a unique individual with his/her specific personality traits, skills, and potentialities. Yet, in observing teachers over time, we can discern some commonalties related to teachers' stages of development. The stages outlined in this model are intended as a framework for understanding how teachers grow and develop. The years of experience given for each stage are very general. In some cases, a teacher's development may become arrested at a particular stage, regardless of the number of years in the classroom. Sometimes circumstances may cause a teacher to revert to an earlier stage. For example, a seasoned Stage IV teacher who moves to a new school will exhibit some of the characteristics of a new Stage I teacher.

A teacher's development actually begins with formal training. However, the teacher's ongoing development occurs within the context of the school. Awareness of the stages of development for teachers helps the head of school to more sensitively support the professional development of each individual teacher.

Stage I. Neonate (first year)

This stage is very much like that of the human neonate–that first fragile period when the newborn is adjusting to life in a new environment outside the womb–in this case, outside the womb of the training stage.

The ultimate task of the neonate stage is *survival*. For the infant, it means being able to breathe, digest, and accommodate one's basic systemic functions to an independent existence in a new environment which is infinitely larger and more complex than the old one. For the teacher, it means making the ideal real. The new teacher must *habituate* within the new environment of the school by developing independent, autonomous patterns or habits of practice in response to the reality of the classroom–and school.

Characteristics

- **Idealistic.** The new teacher is imbued with a vision of the child's potential and convinced of the truth of the Montessori principles.
- **Drawn toward application.** As in the second period of the three-period lesson, the teacher wants to do it herself and believes that it will work.

- **Vulnerable.** Frequently feels overwhelmed by the responsibility undertaken. Fears rejection and failure and is very sensitive to perceived criticism.

Needs

- **Freedom without abandonment.** Must have opportunities to do it by the book (or by the album!), to repeat, and to engage in trial and error.
- **Ongoing orientation to the new school culture.** Guided orientation must be related to issues and circumstances as they arise. The principle of "isolation of difficulty" is very important in the neonate stage.

Support

- **Protection from overwhelming stresses.** Recognize that the major focus must be to establish an intimate relationship with the children in her class. Remove as many obstacles as possible (intervention with a demanding parent, no assignment of faculty committees, etc.).
- **One key personal relationship** (head of school or seasoned faculty member) that provides regular dialogue about the actual implementation of theory into practice.
- **Hands-on support with practical tasks** such as material making, record keeping, ordering supplies, etc.
- **Seminars or dialogue with trainers** to isolate aspects of implementation. The new teacher also values connecting with other new Montessori teachers to more freely share successes and concerns. (E-mail, chat rooms, and teleconferencing offer expanded opportunities.)

Stage II. Consolidation (2-5 years)

During Stage II the teacher begins to integrate the various skills related to her work with the children. She has internalized the theory and specific lessons and is no longer tied to the training album. She can individualize presentations while maintaining awareness of the whole class and is able to communicate effectively with parents.

The second-stage teacher has differentiated the various tasks and skills by isolating difficulties and is now weaving them into a whole practice. The task of the consolidation stage is *fluidity*–an integration of practice.

Characteristics

- **Classroom focus.** The teacher's energy is primarily directed toward her own class.
- **Motivated and self-directed.** Sets tasks and determines methods for herself.
- **Exhibits self-confidence and joy.** This is a natural result of consolidation.

Needs

- **Attention.** There can be a tendency to ignore this seemingly self-sufficient teacher. This second-stage teacher needs *specific feedback* and dialogue that encourages reflection.
- **Stability.** Consolidation requires the opportunity to complete a three-year cycle with a group of children and begin a new cycle.
- **Directed Input.** This teacher is eager to focus more deeply on one aspect related to the classroom. This focus is often shaped by a specific problem, but the teacher can also be encouraged to examine work that is going very well.

Support

- **Continued education related to Montessori.** Refresher courses, workshops, seminars.
- **Observations of other Montessori classrooms.** Particularly at same level.
- **Collegial dialogue.** At Stage II, the teacher is less vulnerable and ready for more "give and take," particularly when discussions are focused around specific elements of classroom practice.
- **Collaborative discussion of expectations and goals** (with head and/or seasoned teacher). During consolidation, the teacher is asking, "What should I expect of myself? the children? the parents?"

Stage III. Renewal (5-7 years)

Once a teacher has achieved consolidation, the head can mistakenly believe that the teacher has reached "maturity." Instead, we need to recognize another stage in the teacher's ongoing development.

Stage three is a very *critical period* in the development of the teacher and marks a major transition point. During this stage, there is the risk of losing good teachers in two ways: 1) They burn out and leave the classroom; or 2) They burn out and remain in the classroom in a state of stasis.

Positive navigation of this stage results in *renewal*–a rededication to the work with a deeper understanding of self and of Montessori.

Characteristics

- **A new period of vulnerability.** The teacher frequently doubts herself or rationalizes what she cannot resolve.
- **Danger of rigidity.** Consolidation can become mere routine and the teacher's mode of practice may resemble "automatic pilot."

- **"Difficult."** The stage-three teacher may exhibit behavior perceived as argumentative or intransigent.
- **Lack of enthusiasm for work.** The teacher may communicate discouragement, a feeling of being "tired of doing the same things," or even talk of changing careers.

In this critical stage, the teacher is asking difficult and essential questions about herself and her work. Where is this going? What are the possibilities? What is *my* potential? What are the potential developments *for me* in this field?

Needs

- **Define self as professional in a broader sense.** The teacher needs to understand the larger context of her work.
- **Discussion of career path options.** What are opportunities for advancement? Is advancement possible while remaining in the classroom?
- **Invest in further study, training, or education.** Renewal requires a *conscious* and *personal* investment in further developing oneself as a teacher.

Support

- **Opportunity to experience leadership in the school community.** Examples: facilitate faculty meetings, design and lead a parent discussion program, chair a committee, organize a faculty study group.
- **Exposure to wider variety of experiences with community professionals.** The stage-three teacher finds involvement with other professional educators by participating in activities and organizations such as a community study group of Montessorians, a network of teachers and health care professionals focused on the ADHD child, an ecological field study class for teachers, etc.
- **Participation in regional and national Montessori conferences.** The teacher may be asked to write up proceedings and make a summary report to faculty or write an article for the newsletter.
- **Observations across the continuum.** By observing children in all the levels within the school and in other Montessori schools, the teacher sees more clearly how her own work fits into the larger patterns of the development of the child.
- **Teacher prepares a five-year plan for her own professional development.** The head uses her plan as part of ongoing evaluation to set priorities and goals and provides concrete financial support.

Stage IV: Seasoned Teacher

To be "seasoned" means to develop character and resiliency by experiencing challenge and weathering change. For a teacher, this stage is akin to renewing vows. Having gone through the critical stage of renewal, this teacher is now *rededicated* to her work at a deeper level and with a heightened sense of purpose.

Characteristics

- **Submerging personal striving.** The seasoned teacher is not struggling to prove herself and is consequently more open to ideas, questions, and critiques.
- **Less need for extrinsic feedback.** Motivation and reward are deeply internalized.
- **Asks the deeper questions in every scenario.** Initiates discussion and centers decision making around key principles and values.

Needs

- **Opportunities for outreach.** The seasoned teacher views her work as extending beyond her own class or school.
- **Creative opportunities.** At Stage IV, the teacher's experience and deeper understanding find creative manifestation in new developments and designs.

Support

- **Enhanced opportunities for leadership in wider arenas.** Examples: deliver an address or present a workshop at a regional/national conference, lead curriculum development efforts, teach a college course, participate in long-range planning, provide leadership on local and national committees.
- **Sabbatical/release time.** The school recognizes the value of the seasoned teacher, not only to the school, but also to the larger educational community. It actively supports the teacher by providing time and resources for intensive study, outreach, project development, and research.

Growth and Sustainability

Fundraising is a critical form of parent involvement; it represents the increasing commitment of the family to the school. Annual fundraising usually involves seasonal events that raise money–the wrapping paper drive in November, the magazine sale in January, the candy sale at Easter, the plant sale in early spring, etc. Annual fundraising is where most schools begin their fundraising activities. These smaller events culminate in larger events such as auctions, community festivals, and craft shows. Initial efforts are small affairs, making only several hundred to a few thousand dollars per event, which may appear to be only a drop in the bucket. But small fundraisers provide a repeated opportunity for giving of both tangible assets and time, as well as a chance for parents to work together, building community while making money with very little investment. Grassroots fundraising is a health indicator and the starting point for annual giving.

Chapter 13. Fundraising, Annual Giving, and the Annual Report *497*

Chapter 14. Capital Campaigns *531*

Chapter 15. Long-Range Planning *573*

Annual giving, or volunteer giving, is the prelude to expansion and capital giving. As contrasted with other annual fundraising, annual giving is an annual campaign for hard cash. This is an important step in a school's development because it reveals the financial reality of the families–that is, their ability to give directly out of their own pocketbooks. It acquaints families with the fact that tuition is never enough and that the school is holding down tuition by allowing those who can give more to do so on a voluntary basis and receive a charitable tax deduction. Annual giving happens every year and is to be distinguished from a major capital campaign, which requests a larger, one-time contribution–*in addition to* the annual giving–for expensive capital items like playgrounds, gyms, and new buildings. Capital campaigns are usually enhanced if school families already know what it means to give cash on an annual basis.

Funds development cannot be viewed in isolation. First and foremost, program and funding are linked. While the link of annual fundraising and annual giving with operations might be more obvious, capital campaigns and endowments also have very real implications for operations. Therefore, it is necessary to have a long-range plan to look at all funds development and program development as one consolidated effort.

Fundraising, Annual Giving, and the Annual Report

Introduction: Annual Fundraising

Initially, annual fundraising and annual giving are designated by the board to support a percentage of operational revenues–up to ten percent is usually considered acceptable. When fundraising supports operations, parents are compelled to give, because if they do not give, the school acquires a deficit. When supporting operations, fundraising is key to keeping the school in good fiscal order. This is a legitimate approach.

However, when a school can charge enough tuition to cover all operations, it should. The advantage here is that with operations already supported, fundraising can be earmarked for small capital items that enhance the school and can be seen as concrete improvements–new musical instruments, computers, outdoor basketball court, etc. When a school matures and becomes more affluent, supporting operations may not be as alluring a motivator for annual giving as small capital improvements. It is also worth noting that designating annual giving for small capital items introduces the idea of goal-oriented giving, which will apply later to the larger goal of a full-fledged capital campaign.

Fundraising Events

Annual fundraising is the school's bread and butter. It also impacts on the quality of life at any school. There is always a danger of community burnout with too many small fundraisers scheduled in a year, especially at a smaller school. It is sometimes better to plan two or three major activities that parents can rally around, building school unity. Newer schools, however, might choose to do several smaller fundraisers in order to minimize fundraising expenses.

A fundraising calendar should be established each spring for the following academic year, with events staggered, not more than once a month. Events selected should be appropriate to the character of the families at the school, tasteful, and fun: health products, energy-saving light bulbs, nature cookbooks, a selective book fair, etc. The most desirable annual fundraising reaches beyond the parents and into the community for profits and visibility.

Avoid events with a high gross and high expenses. If an event costs $7,000 and grosses $12,000, the net profit of $5,000 does not justify the high risk of $7,000 in expenses. Many parents will only contribute a certain amount each year, and whatever goes to expenses is lost. A good approach to fundraising is to maximize net profit and minimize expenses.

Also keep in mind that whenever fundraising goes beyond the immediate school community, some regulation may be involved. Contact city or local government for information on required vendor licenses, food service inspections, etc.

Auction

Community auctions begin with a wide gift solicitation. For a first-time auction, preparation time may be up to one year. The event can net from $20,000 to $80,000, depending on its scope.

Community Festival

Choose any festive holiday for a community celebration with hands-on activities, rides, business booths, food concessions, etc., and raise anywhere from $3,000 to $10,000. Preparation is usually six months to a year.

Holiday bazaars generally are smaller and appeal to school families. They have a smaller selection of booths, raffles, small auctions, lots of food, and, of course, crafts and baked goods made by the parents of the school. Usually expect $3,000-$5,000 from such an event.

Still smaller family-oriented celebrations, designed primarily to build community, can raise $500-$1,000. Square or folk dancing can be fun for both adults and children. International dinners fall into this category, with parents from different lands preparing dishes to educate the palate.

A popular event is a children's marathon or "Great Kid's Race." The school provides a T-shirt and choice of a one-mile or two-mile run. Everyone signs up for this athletic high point in the spring–complete with bake sale and lunch for the runners and spectators. These events run anywhere from the break-even point to a net of about $700.

Garage Sales

Someone's junk is someone else's treasure, and garage sales, combined with bake sales or even live lobsters, will always bring in an easy dollar because there is very little overhead. Count on $1,000 for active giving from every hundred families.

Children's Performance

Advertise your school by bringing in a well-known local children's musician, dance or theater group, or storyteller, renting a good auditorium, and selling tickets both in the neighborhood and through the newspaper. You can net anywhere from $1,000 to $3,000, depending on your outreach.

Raffles

With the prize ranging from a turkey to a computer to a car, a fair amount of money can be made on a raffle, from $2,000 to $10,000 depending on the number of families selling and the quality of prizes. An especially good idea is to raffle off a vacation at a cabin or condo owned by a school family or friend.

Reverse Raffles and Monte Carlo Nights

With food and liquor sales, as well as dancing, these events can net anywhere from $5,000 to $7,000, depending on the number of guests from outside the school.

Selling Drives

Reader's Digest gets the kids selling with a high-incentive gift program that Montessorians might find distasteful, but it does net about $2,500 per hundred families. This particular drive lets purchasers renew any magazine for the school. Other products for school sales abound–cheese, apple cider, calendars, candy bars, wrapping paper, garden bulbs, etc. These sales generally net about $750 per hundred families. Sales drives are not without their caveats: Never allow children to sell door-to-door without an adult chaperon, and work with a reputable company to ensure a fair return. It might be worthwhile to poll school families to see if they would support this type of fundraiser.

Designated Shopping Day

A food store, travel agency, or toy store will sometimes donate a percentage of one day's sales, up to 20%. Art dealers and bookstores, likewise, will sometimes sponsor an aesthetic and/or educational event, donating a percentage of profits from sales during the event to the school. These events can earn up to $400 per one hundred families.

Wine and Cheese

This social event, often held in a locally famous mansion, can bring in about $2,000. Adding a fashion show can increase revenues.

Music Concert

Do you know anybody who knows Paul Simon, the manager of the National Symphony, or even a member of a popular local band? Schools can net from $5,000 to $25,000, depending on the popularity of the performer. The school also receives a lot of favorable publicity.

Food Concessions

Try selling sandwiches at the local air show or LPGA Women's Championship of Golf. If you have some good cooks, catering and food concessions can earn anywhere from $5,000 to $7,000, depending on the variety of foods and the size of the crowds.

Summer Camps

Some schools operate a summer day camp, which not only raises funds but creates publicity for the academic-year program. Camp tuition should take into account depreciation and wear and tear on the building, in addition to direct costs. Camps make anywhere from $5,000 to $30,000, depending on program size and quality.

Annual Giving

For many schools, the direct solicitation of families for cash constitutes a culture shock when first introduced. In setting up an annual giving drive, it is important to be able to state its rationale in a nutshell. Emphasize that annual giving is in effect a way of supplementing tuition by means of a tax-deductible charitable gift: If tuition were simply raised instead of using the voluntary giving approach, then all families would pay the same higher tuition, whether they could afford it or not, and without the tax deduction. Volunteer giving keeps tuition reasonable, helps families save on their taxes, and helps to create a climate of giving, so important to the viability of the school.

Annual Giving for the First Time

When introducing annual giving for the first time, its is important that the board be unanimously behind the effort and fully understand its implications for the school. It also takes a little lead time. The idea of annual giving should be introduced in the first parent mailing in the fall (when the parent handbook is distributed)–but just the rationale, not an actual appeal. The solicitation will come later, after families have had time to accept the concept.

Choosing the Chairperson

The chairperson for the annual giving drive must know enough about the history and social dynamics of the school to anticipate potential giving patterns and to match volunteer solicitors with particular families. As with most major fundraisers, co-chairs are certainly a good idea. Chairpersons must project an entirely positive view of the school. They must be able to delegate and to work with the office staff for the billing. The chairperson coordinates all activities connected with the drive:

- Recruiting and training volunteer solicitors;
- Writing the phone script for solicitors;
- Soliciting volunteers to make their own pledges first;
- Creating pledge cards, record cards, and all other record-keeping paperwork;
- Managing the phone-a-thon (see below);
- Writing follow-up letters to donors;
- Coordinating follow-up phone calls; and
- Working with the office staff for billing of pledged amounts.

Getting Started

The annual giving drive can be initiated at a schoolwide event, such as a picnic or holiday performance. With sentiment running high, the drive is announced and pledge cards passed out. More formal letters of solicitation soon follow in the mail, suggesting either a specific amount relative to what the school thinks each particular family can give *or* a general average amount. A new annual giving campaign may start with a low average gift guideline–perhaps $100 to $200. At maturity, the average suggested gift can be set at about 5% of the tuition level or higher. This is entirely relative to the school. The board must set the amount in relation to what the market will bear. Usually the average gift received is approximately the suggested amount, if the recommended level is in line with the school's particular parent market (see letters and pledge cards in this chapter's Sample Documents). The formal solicitation letter might include a fact sheet comparing the school's tuition with that of other area private schools as well as general financial information about the school. It might also mention that parents who do not wish to be phoned should return their pledge cards early.

The average school shows about 60-80% participation in an annual giving drive. It should be part of the rationale for volunteer giving that a high participation rate encourages large gifts by individual donors, who are more highly motivated when they see everyone else giving. Therefore, the goal should always be 100% participation, even if some families cannot afford the suggested amount.

The Phone-a-Thon

On an appointed night, volunteer parents convene in an office with multiple phone lines to call families who have not returned pledge cards. Begin with a training session for the volunteers and give everyone a packet of information, including the current year's annual giving rationale, a solicitation script with recommended courteous responses to negative reactions, donor cards for keeping records of each family being solicited, etc. (see examples in this chapter's Sample Documents).

In a short rally prior to the calls, each parent solicitor may be asked to say why he or she is participating, giving positive reasons to raise the morale of the evening's effort. Offer prizes for the caller with the greatest increase in pledges from what parents gave in the previous year. Have fun and lighten up the discomfort in making these kinds of phone calls.

Follow-Up

Either the solicitor or the school office should send a thank-you letter to confirm each pledge. After the phone-a-thon, there will be unresolved pledges that require follow-up calls. The thoroughness of the follow-up calls and their sensitive handling can make or break an annual giving campaign. Therefore, the best volunteers should be saved for this "wrapping up" of the campaign.

Billing

See Chapter 3 for other uses of a database in school finances.

Billing through the school office is usually more efficient than having volunteers handle collections. Mechanize the billing using a database and form letters to collect monthly, quarterly, or semi-annual pledges. A centralized database can also generate ongoing status reports on funds received and outstanding pledges.

Annual Report

Annual reports, originally conceived as fiscal reports distributed at annual meetings, have now become showpiece graphics designed to project the history, vision, and future prosperity of the school. They become necessary when fundraising is a high-profile, high-priority activity at a school. Annual reports may include the following topics:

- Enrollment Report: Past and Future Projections, Current Enrollment
- Operational Revenues and Expenses
- Statement of Financial Aid
- Annual Giving Report
- Capital Campaign Report (if applicable)
- Donor Lists
- History of the School
- Existing and New Programs
- Excerpts from the Long-Range Plan

Typically, each section of the report is written by the appropriate member of administration or of the board. The board chair, for instance, may confirm the board's dedication to the future of the school. The head of school may talk about new expansion and innovation in the program as well as the vision of the whole, giving enrollment figures and projections to indicate growth. The business manager or treasurer may give the financials, and the director of development or fundraising chair the outcomes of fundraising, acknowledging in particular the donors who gave to the annual drive. The annual report can also demonstrate the achievement of intermediate goals needed to realize the Long-Range Plan.

See Chapter 15 for information on the Long Range Plan

Frequently Asked Questions

How does one know when it is appropriate to change budgeting so that annual fundraising no longer supports a budget deficit but creates funds strictly targeted for capital improvements? What are the consequences of such a decision?

This is as much a philosophical decision as anything else. When a school uses annual giving to subsidize tuition, it is encouraging those with higher income to offset tuition for those with lower income, creating a volunteer giving ethic. When tuition is raised so that all annual expenses are covered, everyone is paying the same tuition. No longer do the higher-income families give to the annual fund drive in order to "hold tuition down." Some schools choose not to make this change because they prefer to preserve the volunteer giving ethic.

Many schools, however, do raise tuition to cover all annual expenses, especially when waiting lists show that there are enough families who can afford to pay the unsubsidized tuition. At this point, it is advisable to provide additional scholarships in order to maintain a social conscience as well as socioeconomic balance in the school. Fundraising that is no longer being used to subsidize tuition can fund the additional scholarships.

How much should a school expect to fundraise from its families?

This is a very relative question. A school that is new to fundraising has to build up an internal process and the right combination of people for fundraising events. So beginning fundraising totals are lower. Also, where average incomes are higher, fundraising totals will also be higher. Yet there are certain rules of thumb, depending on the size of the school. Established schools with approximately 100 families can expect to raise about $25,000 to $40,000 annually. Schools with about two hundred families can expect approximately $60,000 to $90,000.

Further Reading from NAMTA

The following articles and documents are available as photocopies from NAMTA. See Appendix 4 for ordering information.

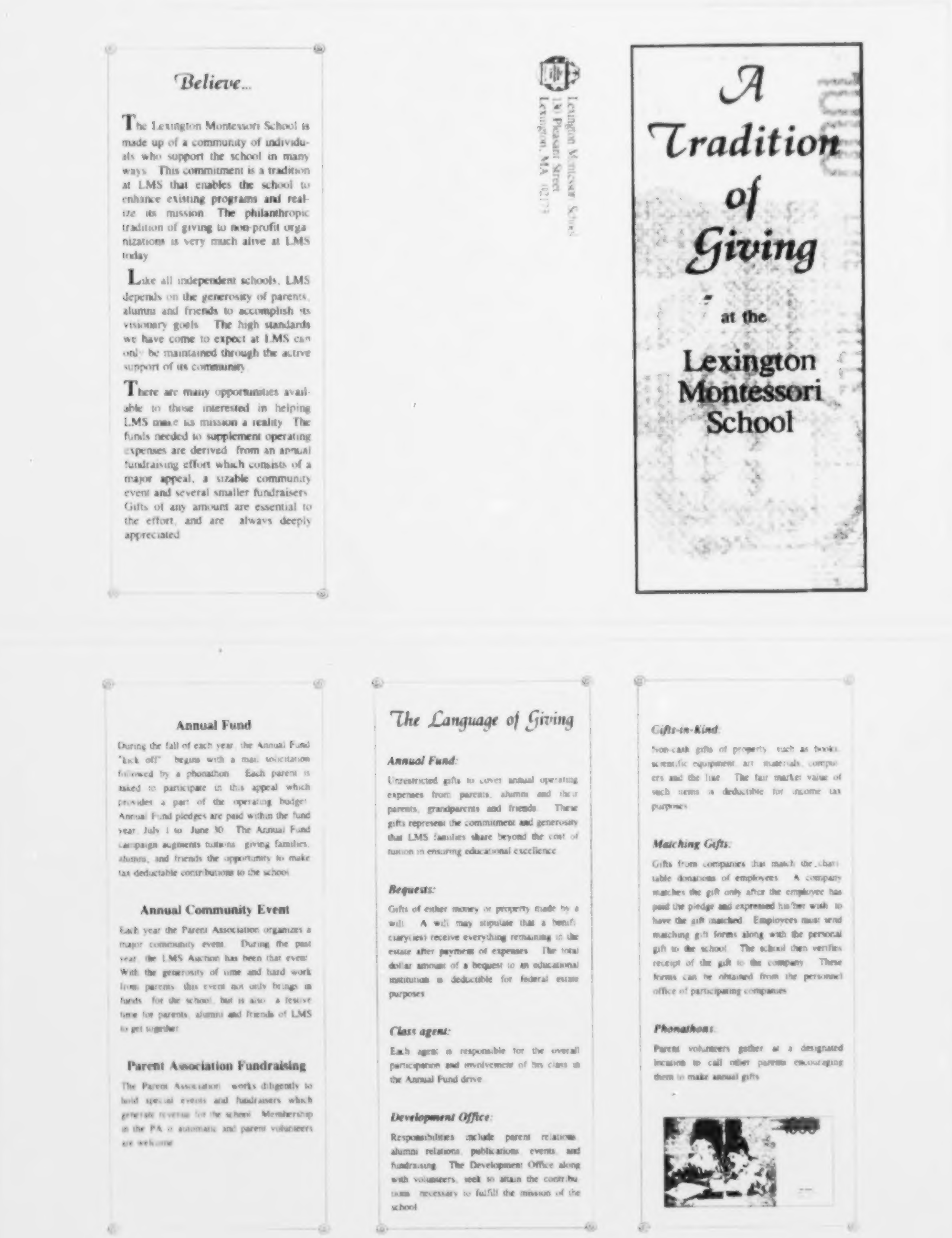
Amer, Patrick J. "Volunteer Giving: A Fundraising Letter." *The NAMTA Quarterly* 1.2 (1976, Winter): 34-37. 2 total pages.

Kahn, David. "A Fundraiser for Children: Slim Goodbody." *The NAMTA Quarterly* 2.3 (1977, Spring): 53-54. 2 total pages.

Sample Documents

The following documents illustrate common practices in Montessori school operations. To view documents at full size, photocopy and enlarge.

A Tradition of Giving, Lexington Montessori School (Lexington, MA)



Believe...

The Lexington Montessori School is made up of a community of individuals who support the school in many ways. This commitment is a tradition at LMS that enables the school to enhance existing programs and realize its mission. The philanthropic tradition of giving to non-profit organizations is very much alive at LMS today.

Like all independent schools, LMS depends on the generosity of parents, alumni and friends to accomplish its visionary goals. The high standards we have come to expect at LMS can only be maintained through the active support of its community.

There are many opportunities available to those interested in helping LMS make its mission a reality. The funds needed to supplement operating expenses are derived from an annual fundraising effort which consists of a major appeal, a sizable community event and several smaller fundraisers. Gifts of any amount are essential to the effort, and are always deeply appreciated.

Lexington Montessori School
130 Pleasant Street
Lexington, MA 02173

A Tradition of Giving

at the

Lexington Montessori School

Annual Fund

During the fall of each year, the Annual Fund "kick off" begins with a mail solicitation followed by a phonathon. Each parent is asked to participate in this appeal which provides a part of the operating budget. Annual Fund pledges are paid within the fund year, July 1 to June 30. The Annual Fund campaign augments tuitions, giving families, alumni, and friends the opportunity to make tax deductable contributions to the school.

Annual Community Event

Each year the Parent Association organizes a major community event. During the past year, the LMS Auction has been that event. With the generosity of time and hard work from parents, this event not only brings in funds for the school, but is also a festive time for parents, alumni and friends of LMS to get together.

Parent Association Fundraising

The Parent Association works diligently to hold special events and fundraisers which generate revenue for the school. Membership in the PA is automatic and parent volunteers are welcome.

The Language of Giving

Annual Fund:

Unrestricted gifts to cover annual operating expenses from parents, alumni and their parents, grandparents and friends. These gifts represent the commitment and generosity that LMS families share beyond the cost of tuition in ensuring educational excellence.

Bequests:

Gifts of either money or property made by a will. A will may stipulate that a beneficiary(ies) receive everything remaining in the estate after payment of expenses. The total dollar amount of a bequest to an educational institution is deductible for federal estate purposes.

Class agent:

Each agent is responsible for the overall participation and involvement of his class in the Annual Fund drive.

Development Office:

Responsibilities include parent relations, alumni relations, publications, events, and fundraising. The Development Office along with volunteers, seek to attain the contributions necessary to fulfill the mission of the school.

Gifts-in-Kind:

Non-cash gifts of property, such as books, scientific equipment, art materials, computers and the like. The fair market value of such items is deductible for income tax purposes.

Matching Gifts:

Gifts from companies that match the charitable donations of employees. A company matches the gift only after the employee has paid the pledge and expressed his/her wish to have the gift matched. Employees must send matching gift forms along with the personal gift to the school. The school then verifies receipt of the gift to the company. These forms can be obtained from the personnel office of participating companies.

Phonathons:

Parent volunteers gather at a designated location to call other parents encouraging them to make annual gifts.

A unique brochure defining terms and establishing a climate of giving for the school. The brochure does not include the category of capital campaign.

Financing an Independent School, Lexington Montessori School (Lexington, MA)

Financing an

Independent School

Information for LMS Parents

Introduction

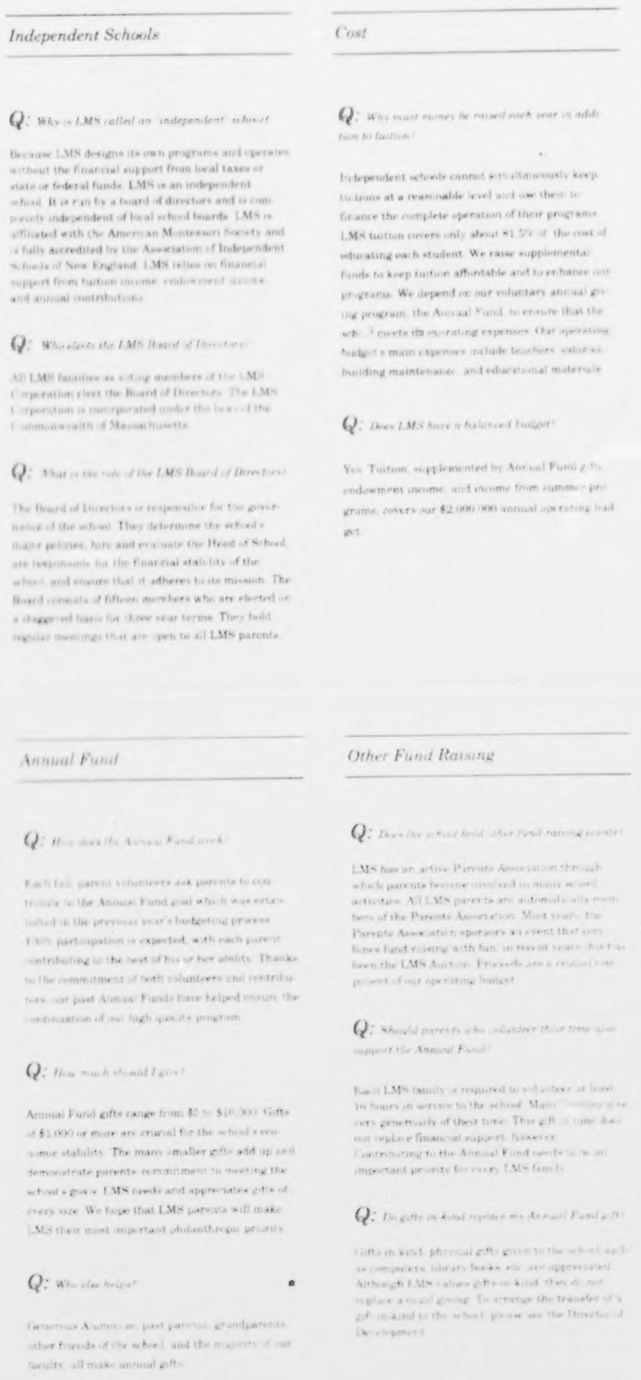
The Lexington Montessori program is based on the child-centered theories and work of Maria Montessori. Since its founding in 1963 by a group of parents, the school has been committed to helping children grow socially, emotionally, cognitively, aesthetically, and physically while also developing self-awareness and an understanding of themselves as members of the world community.

Each Lexington Montessori School family plays an important role in the school community. Parents are active partners in their child's education. In addition, LMS parents share in the responsibilities of ensuring a soundly governed and financially healthy school.

Independent Schools such as the Lexington Montessori School operate differently from public schools. This brochure introduces you to some of those differences and to the responsibilities of independent school parents.

A question-and-answer approach to explaining private giving.

Financing an Independent School, Lexington Montessori School (continued)



Independent Schools

Q: *Why is LMS called an "independent" school?*

Because LMS designs its own programs and operates without the financial support from local taxes or state or federal funds, LMS is an independent school. It is run by a board of directors and is completely independent of local school boards. LMS is affiliated with the American Montessori Society and is fully accredited by the Association of Independent Schools of New England. LMS relies on financial support from tuition income, endowment income and annual contributions.

Q: *Who elects the LMS Board of Directors?*

All LMS families as voting members of the LMS Corporation elect the Board of Directors. The LMS Corporation is incorporated under the laws of the Commonwealth of Massachusetts.

Q: *What is the role of the LMS Board of Directors?*

The Board of Directors is responsible for the governance of the school. They determine the school's major policies, hire and evaluate the Head of School, are responsible for the financial stability of the school, and ensure that it adheres to its mission. The Board consists of fifteen members who are elected on a staggered basis for three year terms. They hold regular meetings that are open to all LMS parents.

Cost

Q: *Why must money be raised each year in addition to tuition?*

Independent schools cannot simultaneously keep tuitions at a reasonable level and use them to finance the complete operation of their programs. LMS tuition covers only about 81.5% of the cost of educating each student. We raise supplemental funds to keep tuition affordable and to enhance our programs. We depend on our voluntary annual giving program, the Annual Fund, to ensure that the school meets its operating expenses. Our operating budget's main expenses include teachers' salaries, building maintenance, and educational materials.

Q: *Does LMS have a balanced budget?*

Yes. Tuition, supplemented by Annual Fund gifts, endowment income, and income from summer programs, covers our $2,000,000 annual operating budget.

Annual Fund

Q: *How does the Annual Fund work?*

Each fall, parent volunteers ask parents to contribute to the Annual Fund goal which was established in the previous year's budgeting process. 100% participation is expected, with each parent contributing to the best of his or her ability. Thanks to the commitment of both volunteers and contributors, our past Annual Funds have helped ensure the continuation of our high quality program.

Q: *How much should I give?*

Annual Fund gifts range from $5 to $10,000. Gifts of $1,000 or more are crucial for the school's economic stability. The many smaller gifts add up and demonstrate parents' commitment to meeting the school's goals. LMS needs and appreciates gifts of every size. We hope that LMS parents will make LMS their most important philanthropic priority.

Q: *Who else helps?*

Generous Alumni/ae, past parents, grandparents, other friends of the school, and the majority of our faculty, all make annual gifts.

Other Fund Raising

Q: *Does the school hold other fund-raising events?*

LMS has an active Parents Association through which parents become involved in many school activities. All LMS parents are automatically members of the Parents Association. Most years, the Parents Association sponsors an event that combines fund raising with fun. In recent years this has been the LMS Auction. Proceeds are a crucial component of our operating budget.

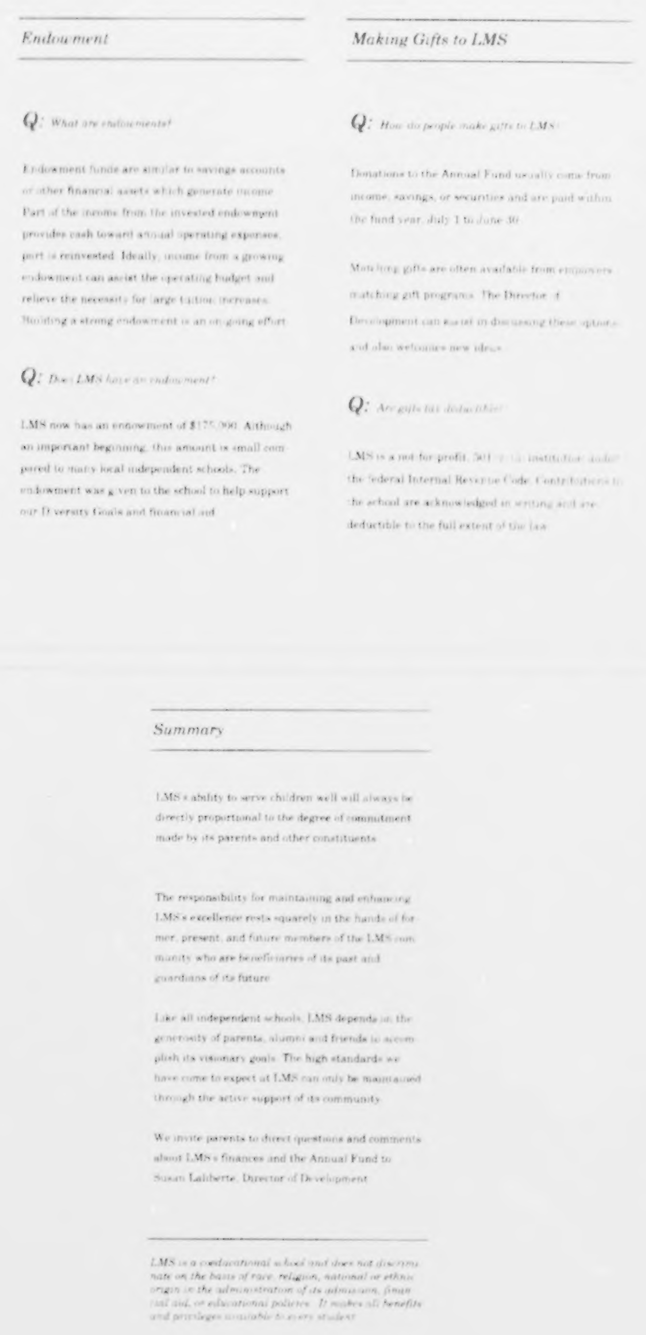
Q: *Should parents who volunteer their time also support the Annual Fund?*

Each LMS family is required to volunteer at least 16 hours in service to the school. Many families give very generously of their time. This gift of time does not replace financial support, however. Contributing to the Annual Fund needs to be an important priority for every LMS family.

Q: *Do gifts in kind replace my Annual Fund gift?*

Gifts in kind, physical gifts given to the school such as computers, library books, etc., are appreciated. Although LMS values gifts in kind, they do not replace annual giving. To arrange the transfer of a gift in kind to the school, please see the Director of Development.

Financing an Independent School, Lexington Montessori School (continued)



Endowment

Q: What are endowments?

Endowment funds are similar to savings accounts or other financial assets which generate income. Part of the income from the invested endowment provides cash toward annual operating expenses, part is reinvested. Ideally, income from a growing endowment can assist the operating budget and relieve the necessity for large tuition increases. Building a strong endowment is an on-going effort.

Q: Does LMS have an endowment?

LMS now has an endowment of $175,000. Although an important beginning, this amount is small compared to many local independent schools. The endowment was given to the school to help support our Diversity Goals and financial aid.

Making Gifts to LMS

Q: How do people make gifts to LMS?

Donations to the Annual Fund usually come from income, savings, or securities and are paid within the fund year, July 1 to June 30.

Matching gifts are often available from employers' matching gift programs. The Director of Development can assist in discussing these options and also welcomes new ideas.

Q: Are gifts tax deductible?

LMS is a not-for-profit, 501 (c) (3) institution under the Federal Internal Revenue Code. Contributions to the school are acknowledged in writing and are deductible to the full extent of the law.

Summary

LMS's ability to serve children well will always be directly proportional to the degree of commitment made by its parents and other constituents.

The responsibility for maintaining and enhancing LMS's excellence rests squarely in the hands of former, present, and future members of the LMS community who are beneficiaries of its past and guardians of its future.

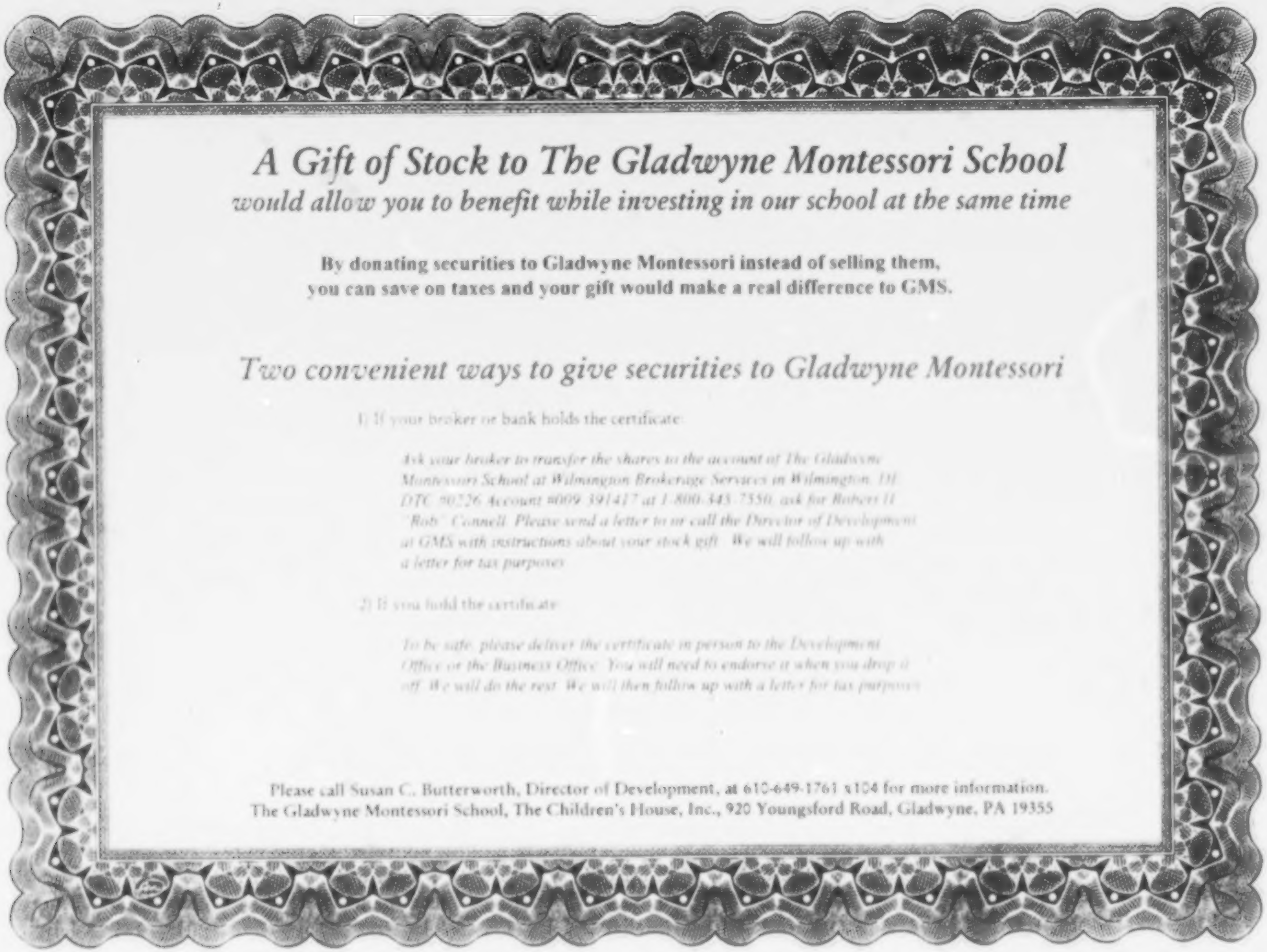
Like all independent schools, LMS depends on the generosity of parents, alumni and friends to accomplish its visionary goals. The high standards we have come to expect at LMS can only be maintained through the active support of its community.

We invite parents to direct questions and comments about LMS's finances and the Annual Fund to Susan Laliberte, Director of Development.

LMS is a coeducational school and does not discriminate on the basis of race, religion, national or ethnic origin in the administration of its admission, financial aid, or educational policies. It makes all benefits and privileges available to every student.

A Gift of Stock, Gladwyne Montessori School (Gladwyne, PA)

A media piece designed to explain and solicit stock donations



A Gift of Stock to The Gladwyne Montessori School

would allow you to benefit while investing in our school at the same time

By donating securities to Gladwyne Montessori instead of selling them, you can save on taxes and your gift would make a real difference to GMS.

Two convenient ways to give securities to Gladwyne Montessori

1) If your broker or bank holds the certificate:

Ask your broker to transfer the shares to the account of The Gladwyne Montessori School at Wilmington Brokerage Services in Wilmington, DE DTC #0226 Account #009 391417 at 1-800-345-7550, ask for Robert H. "Rob" Connell. Please send a letter to or call the Director of Development at GMS with instructions about your stock gift. We will follow up with a letter for tax purposes.

2) If you hold the certificate:

To be safe, please deliver the certificate in person to the Development Office or the Business Office. You will need to endorse it when you drop it off. We will do the rest. We will then follow up with a letter for tax purposes.

Please call Susan C. Butterworth, Director of Development, at 610-649-1761 x104 for more information.
The Gladwyne Montessori School, The Children's House, Inc., 920 Youngsford Road, Gladwyne, PA 19355

Annual Giving Letters

Targeted to new parents, old parents, more affluent families, and special donors, these letters allow for variation in gift specifications.

Dear Parents,

As a ______ School parent who cares deeply about your child's education, you will, we hope, consider the reasons for supporting ______ School's 1999-2000 Annual Giving campaign.

In a sense, every student at ______ School has a scholarship. What you are paying in tuition this year falls about $210 short of the cost of educating a child. (The differential would be far greater if we didn't all pitch in to sell hot dogs at the Golf Tournament, drive for field trips, bake brownies, rake the grounds, and do what we can to keep costs down.)

Nonetheless, we depend heavily on Annual Giving donations to meet our day-to-day operating budget. If we are to finish this year within our budget, we must raise $62,000. Of this amount, $28,000 should come from Annual Giving contributions, which are, of course, tax-deductible for you.

If you are unable to give the much-needed amount of $250, please give careful thought to an amount that would be comfortable for you. Every donation counts; every donation brings us just that much closer to our goal. .

You may be among the families who did not make a pledge to ______ School last year. If so, we'd like to suggest that you place your child's school high on the list of your priorities this year. To maintain our excellent program, we truly need your help.

Sincerely,

Co-Chairpersons, Annual Giving

Dear Parents,

New and veteran families alike sense that ______ School offers a splendid academic program at a tuition rate considerably lower than those at other area private schools. We have doubled our facility, expanded our offerings in French, music, art, and gym, retained a superb faculty, and maintained our buildings—all at a modest tuition raise of 7%.

How do we do it? We count on being able to raise a large amount each year through fundraisers. Our operating budget this year is predicated upon our being able to realize $62,000 through volunteer efforts. Of that total, $28,000 must come from Annual Giving.

As many of you already know, your contribution to the Annual Giving campaign is tax deductible. Again this year, we are asking each family for a $250 donation. We sincerely hope that those of you who can afford to be more generous will give more.

If you are new to the School, we want to emphasize, as we do each year, that the total number of families who give is an extremely important factor to the foundations we approach for additional funding. A high percentage of givers signals an involved, active parent body. Therefore, if you are unable to pledge $250 or more, please contribute what you can.

A ______ School parent volunteer will be calling you on Tuesday evening, November 15, between 7:00 and 9:00 p.m., or in the weeks that follow, to record your pledge. A pledge card is enclosed so that you will have time to consider your gift carefully.

We thank you in advance for your cooperation.

Sincerely,

Co-Chairpersons, Annual Giving

Annual Giving Letters (continued)

Dear Parents,

You don't think of your children as having scholarships to ______ School, but, in effect, each child does. What you're paying in tuition this year—a modest 7% over last year's, charge—falls about $210 short of the cost of educating that child.

The fact that tuitions do not cover ______ School's operating expenses comes as no surprise to the many of you who've been cooking hot dogs, buying magazines, selling children's theatre tickets, raking the school grounds, driving for field trips, and doing whatever else you can to help keep tuitions affordable for children from a variety of economic backgrounds.

All of these efforts help. However, we also depend upon our Annual Giving Campaign to raise a substantial part of our operating expenses. Of this year's total $62,000 to be realized by concentrated fundraising, $28,000 must come from Annual Giving.

Annual Giving works only if there is a range of giving. Those families who can give more offset those who are not able to give the needed amount of $250.

We are hoping that you are among those families who could give an increased amount. We have established a second level of giving at $500 and ask that you consider this higher target, or even more if you can.

In the next couple of weeks, a ______ School parent will be contacting you on behalf of this campaign. We urge you to respond as generously as you can.

Sincerely,

Co-Chairpersons, Annual Giving

Dear Friends of ______ School,

We are proud of the fact that ______ School is offering a splendid academic program at a tuition rate considerably lower than those at other area private schools. In fact, we have doubled our facility, expanded our offerings in French, music, art, and gym, retained a superb faculty, and maintained our buildings—all at a modest tuition raise of 7% this year.

How do we do it? We depend on being able to raise a large amount each year through fundraisers. Our current operating budget is predicated upon our being able to realize $62,000 from volunteer efforts. Of that total, $28,000 must come from Annual Giving.

We have been most pleased by your generosity in the past. Your contributions have played a significant role in our being able to offer a quality educational program to children from a wide variety of economic backgrounds.

May we count on your continued support?

Sincerely,

Co-Chairpersons, Annual Giving

Specialized Annual Giving Letters, Lake Country School (Minneapolis, MN)

Dear Lake Country Staff, November 7, 1997

In a recent conversation, one of our parents described Lake Country School as "one of the gems of the Twin Cities." I agree with that parent and know that the credit for this exceptional school goes to the staff. Your vision, dedication and hard work on behalf of the children is wonderful and I am honored to work among you. I particularly appreciate your generosity in going beyond your own responsibilities to support one another and to improve the physical and educational environment of Lake Country School.

As you know, the success of Annual Fund Drive is crucial to advancing our collective vision for Lake Country School. The purpose of the Annual Fund is to keep tuition affordable, to balance the operating budget and to provide tuition assistance. Due to the generosity of parents, staff and friends during the 1996-97 Annual Fund Drive, we were able to install the acoustical tiling in the gymnasium and, for the first time, meet almost 100% of the demonstrated need of scholarship families while keeping tuition almost 10% below the actual cost of educating our children. Each of us and every Lake Country family directly benefited while making LCS affordable to a broader range of children in our community.

Our goal this year is 100% participation from families and staff. Such wide participation demonstrates the commitment of our community to outside funding sources but, more importantly, it boosts the morale of our wonderful parent volunteers. If everybody participates, they see that others care about the school as much as they do and feel rewarded for their considerable efforts.

So, I am writing to ask you to make a tax deductible contribution to the school. It is the generosity of making the gift, not the size that is most meaningful. Enclosed is a pledge card and return envelope for making your gift. Thank you for your involvement and investment on behalf of the children and community of Lake Country School.

Sincerely,

Kathy Coskran
Principal

P.S. To make your gift through payroll deductions, please see Paul.

These letters, targeted to faculty, alumni parents, and grandparents, reach beyond immediate families and can bring in significant gifts.

Specialized Annual Giving Letters, Lake Country School (continued)

Dear Alum Parents of Lake Country School, October 30, 1997

We celebrated a first at Lake Country this year when Katie Mullin, daughter of John Mullin (JH 83), and Adriana Haley, daughter of Tamera Haley (E II 80), entered Children's House. They are the first "children of our children" to enter Lake Country School. It is both moving and rewarding to be welcoming children of our own alums to Lake Country and to realize that by the time Katie and Adriana graduate in 2009, many children of alums will be at Lake Country. We are delighted that the school is here to serve them.

Lake Country has been a central force in the lives of many of our families. Your children probably spent more of their school years at Lake Country than at any other educational institution. When you chose Lake Country you became part of a community that honors children and that believes profoundly with Maria Montessori that "within the child lies the fate of the future." The arrival of our first alum children this year has made us particularly aware of how important it is to secure the future of Lake Country for our children's children. To do so, we invite you to support our work through a contribution to the Annual Fund.

For more than twenty years, the Annual Fund has enabled us to keep tuition affordable while providing tuition assistance to families who need it. In the most recent Annual Fund drive, the generosity of current parents, alum families, and staff made it possible, for the first time, to meet 90% of demonstrated need for scholarships while keeping tuition 10% below the actual cost of educating the children. Our goal this year is to meet 100% of demonstrated need for scholarships. We need your help to do that. Please use the enclosed pledge card and return envelope to make a gift to Lake Country School.

We value your continued belief in and support of the school. Our collective investment directly affects the quality of the extraordinary learning environments that our children (and now grandchildren!) experience every day. Thank you for your generosity and for staying connected.

Sincerely,

Kathy Coskran
Principal

Larry and Pat Schaefer
Co-Founders

P.S. The Alum Council is planning a holiday gathering for all alums on January 2 at Lake Country and hopes to publish an Alum Directory soon. Please keep us updated on address changes and information about yourself and your children so we can keep you informed about Lake Country events.

Dear Grandparents of Lake Country School, October 30, 1997

What a pleasure it is for us to have your grandchild as a student at Lake Country School. When your child chose Lake Country for your grandchild, your family became part of a community that honors children and that believes profoundly with Maria Montessori that "within the child lies the fate of the future."

Lake Country is central in the lives of our families. Your grandchild will probably spend more of his or her school years at Lake Country than at any other educational institution. Presenting your grandchild with a beautiful, prepared environment staffed by trained professionals is fundamental to the Lake Country philosophy of education. To maintain and improve the quality of Lake Country School while continuing to keep tuition affordable, we reach out to all members of our community, including our grandparents, to support our work through a gift to the Annual Fund.

For more than twenty years, the Annual Fund has enabled us to keep tuition affordable while providing financial assistance to families who need it. In the most recent Annual Fund drive, the generosity of current parents, alum families, grandparents and staff made it possible to keep tuition 10% below the actual cost of educating the children while meeting over 90% of demonstrated financial need. To continue to hold tuition low, meet financial need and maintain the quality of our educational environment, we need your help.

Please use the enclosed pledge card and return envelope to make your gift to Lake Country School. Our collective investment directly affects the quality of the extraordinary learning environments that our children (and grandchildren!) experience every day. Thank you for your generosity and support of your grandchild's educational experience at Lake Country School.

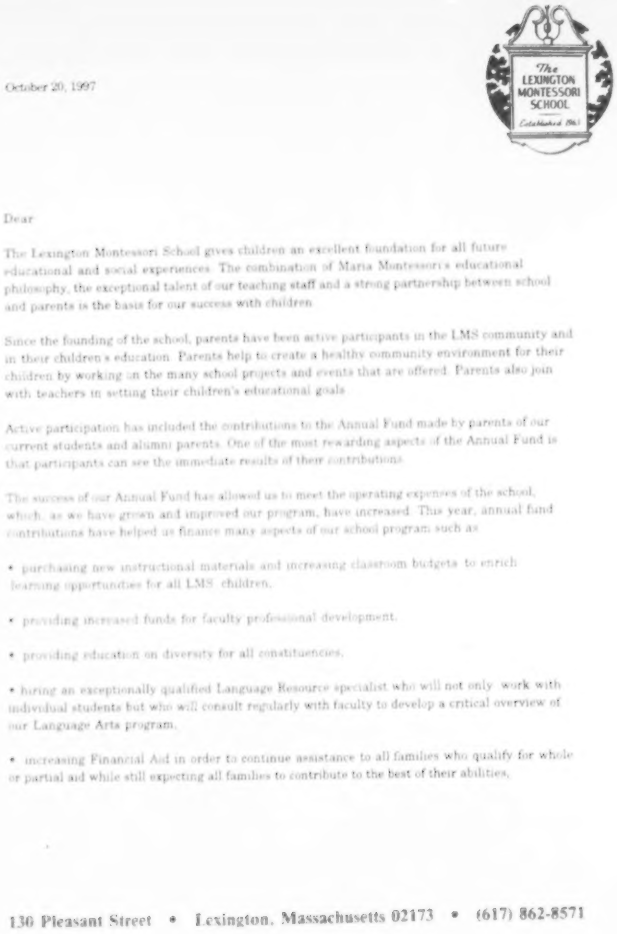
Sincerely,

Kathy Coskran
Principal

P.S. The second annual Lake Country School Grandparents' Day will be on Friday, May 8, 1998. Hope you can join us for this very special event.

Annual Giving Letter with Graphics, Lexington Montessori School (Lexington, MA)

Written to solicit funds to meet the operations budget, this letter mentions recently funded programs as well as small capital items, giving a variety of well-thought-out reasons to give.



The
LEXINGTON
MONTESSORI
SCHOOL
Established 1963

October 20, 1997

Dear

The Lexington Montessori School gives children an excellent foundation for all future educational and social experiences. The combination of Maria Montessori's educational philosophy, the exceptional talent of our teaching staff and a strong partnership between school and parents is the basis for our success with children.

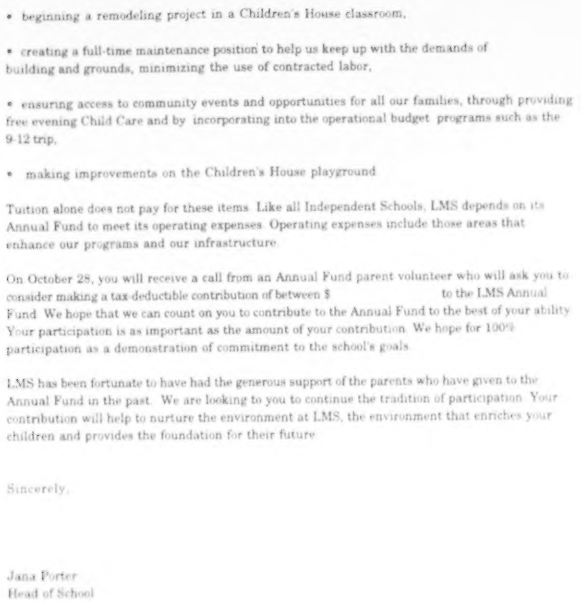
Since the founding of the school, parents have been active participants in the LMS community and in their children's education. Parents help to create a healthy community environment for their children by working on the many school projects and events that are offered. Parents also join with teachers in setting their children's educational goals.

Active participation has included the contributions to the Annual Fund made by parents of our current students and alumni parents. One of the most rewarding aspects of the Annual Fund is that participants can see the immediate results of their contributions.

The success of our Annual Fund has allowed us to meet the operating expenses of the school, which, as we have grown and improved our program, have increased. This year, annual fund contributions have helped us finance many aspects of our school program such as

- purchasing new instructional materials and increasing classroom budgets to enrich learning opportunities for all LMS children,
- providing increased funds for faculty professional development,
- providing education on diversity for all constituencies,
- hiring an exceptionally qualified Language Resource specialist who will not only work with individual students but who will consult regularly with faculty to develop a critical overview of our Language Arts program,
- increasing Financial Aid in order to continue assistance to all families who qualify for whole or partial aid while still expecting all families to contribute to the best of their abilities,

136 Pleasant Street • Lexington, Massachusetts 02173 • (617) 862-8571



- beginning a remodeling project in a Children's House classroom,
- creating a full-time maintenance position to help us keep up with the demands of building and grounds, minimizing the use of contracted labor,
- ensuring access to community events and opportunities for all our families, through providing free evening Child Care and by incorporating into the operational budget programs such as the 9-12 trip,
- making improvements on the Children's House playground.

Tuition alone does not pay for these items. Like all Independent Schools, LMS depends on its Annual Fund to meet its operating expenses. Operating expenses include those areas that enhance our programs and our infrastructure.

On October 28, you will receive a call from an Annual Fund parent volunteer who will ask you to consider making a tax-deductible contribution of between $ to the LMS Annual Fund. We hope that we can count on you to contribute to the Annual Fund to the best of your ability. Your participation is as important as the amount of your contribution. We hope for 100% participation as a demonstration of commitment to the school's goals.

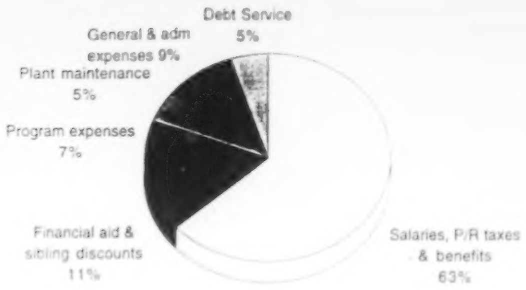
LMS has been fortunate to have had the generous support of the parents who have given to the Annual Fund in the past. We are looking to you to continue the tradition of participation. Your contribution will help to nurture the environment at LMS, the environment that enriches your children and provides the foundation for their future.

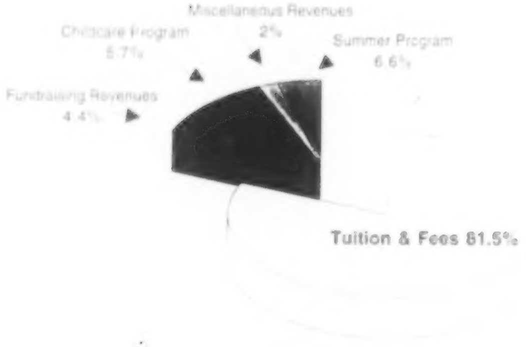
Sincerely,

Jana Porter
Head of School

Annual Giving Letter with Graphics, Lexington Montessori School (continued)

LMS Expenses

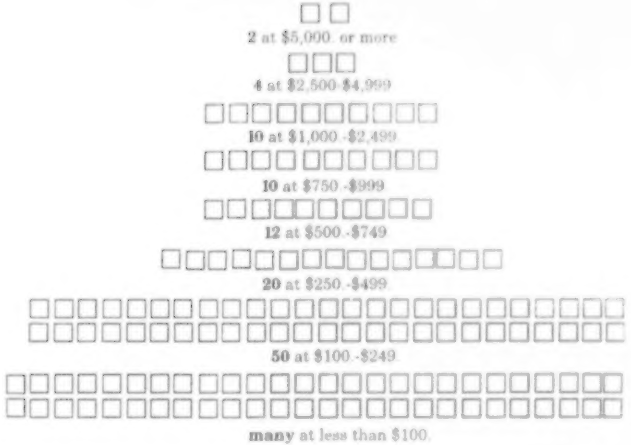




LMS Revenues

LMS 1997-98 Annual Fund Gift Pyramid

Expected Number of Gifts Needed to Raise
$55,000.


2 at $5,000. or more
4 at $2,500-$4,999
10 at $1,000.-$2,499
10 at $750.-$999
12 at $500.-$749
20 at $250.-$499
50 at $100.-$249
many at less than $100.

Annual Giving Packet, Lexington Montessori School (Lexington, MA)

DIRECTIONS TO THE PHONATHON

Alpha Software
168 Middlesex Turnpike
Burlington, MA
(617)229-2924
ask for Richard Rabins or Nancy Stern

From both Route 128 North and South take exit 32B

Take the Middlesex Turnpike and turn towards the direction of the Burlington Mall. Drive past the mall, through the lights at Mall Road, and past the smaller Tower Records mall. About **.5** miles from this mall you will see a rectangular sign on your left with **Fourth Avenue Entrance, Northwest Park** written on it. Take an immediate left and then turn left into the driveway of Alpha Software. There are no signs marking Alpha. The front door is to the right hand side facing the building.

LMS 1997-98 ANNUAL FUND

Timetable

Date	Event
October 6	Lisa's letter (head agent) sent to current families Kathy's letter (head agent for alums) sent to alumni parents who donated last year
October 8	Kathy's letter sent to non-donor alumni parents
October 21	Jana's letter with targeted range sent out to current families and parents of alumni who donated last year
October 23	Jana's letter sent out to non-donor parents of alumni
October 28 @ 6:30 p.m	**Agent orientation @ Alpha Software (see directions)** (agents are briefed on how to make phonathon telephone calls-good time to train for calls)
October 28 @ 7:00 p.m	**Annual Fund Phonathon**
October 29 through November 11	Follow-up phone calls to parents who could not be reached or who have yet committed to a pledge on October 28
No later than **November 11**	**Return all solicitation logs to: Susan Laliberte, Development Office**

This annual giving packet includes a variety of materials for the solicitor, giving an overview of the whole drive. Copies of the solicitation letters (see above) are also included in the packet

Annual Giving Packet, Lexington Montessori School (continued)

1997-98 LMS Annual Fund

Talking Points

Below are suggested approaches to talking about gifts at various giving levels.

For All Families:

- Our budget is just over $2 million. Tuition covers just 81.5% of our operating revenue. The remainder is covered by other income and voluntary support, of which the Annual Fund is critical.
- Last year we received Annual Fund gifts from 89% of all current families. This was a very affirming show of support and this year we hope to do even better.
- Our Annual Fund year runs from July 1 to June 30. Most donors prefer to pay their pledges before the end of the calendar year, but we are happy to accept donations in the first half of 1998.
- Pledges can be paid in up to five equal monthly installments in November through March. The school will send pledge reminders reflecting donors' anticipated payment schedule. This would be $______ per month for 5 months.
- The Annual Fund supplements the tuition of each child at LMS by $263 per child (or $342 per family).
- You may be able to double your gift through the corporate matching gifts program at your place of employment. Please check with your human resources department to see if your company participates in this program.

For Increased Gifts:

- We are able to keep tuition costs at a reasonable level because we count on the healthy growth of our annual giving program, which contributes directly to the operating budget.
- (*For those families that are in this gift giving range*) In order to reach our goal of $55,000, we expect that we will need to have 25 families contribute $750 or more. This is twice as many families as contributed at these levels last year.

For Alumni Parents:

- As an LMS parent of an alumni/ae you know what a solid educational foundation can mean for a child. LMS still provides its students with a quality education rooted in the basics - the foundation upon which they can build interesting, productive lives. This kind of education is expensive and the school needs your help. Parents of alumni gifts to the annual fund play an important role in meeting the expenses of running an excellent school.

For Gifts of Securities:

- LMS is delighted to accept donations of securities. Since the stock market is at an all-time high, this is a particularly advantageous time to give stock. Donors are able to deduct their gift at its market value and avoid paying capital gains tax. Many people may be able to make much larger gifts than possible if they were to give cash.

  Instructions for giving securities:

  Either you may call or instruct your broker that you are making a gift to LMS and ask him/her to call Sharon Lawler at (617)862-8571.

1997-98 LMS Annual Fund

Sample Phonathon Script for Soliciting First-Time Donors

The following is a suggested script for calling LMS parents who are new to the school or who have not contributed to the Annual Fund in previous years. We have found that the approach outlined below seems to work well, but please feel free to improvise.

Salutation/Opening Comments:

Since it is likely that you already know the individuals you are to call, and perhaps have even seen them recently (e.g., at the Class Potluck), it would be most natural to engage in some informal conversation with them before bringing up the Annual Fund. It is useful to plan the "small talk" you will use with each individual before you pick up the telephone. A more formal approach is outlined below.

"Hello. This is ________ calling on behalf of the Lexington Montessori School. My child ________ is in ________'s class along with (their child's name). I'm calling tonight to ask you for a pledge to the LMS Annual Fund. Did you receive the letters from Jana and Lisa telling parents about the fund and our hopes for this year? Can we count on you for a gift of $__________? We are looking for 100% participation from the entire LMS community.

Closing Comments: If the answer is . . .

Yes: *"We really appreciate your help in supporting the school's programs. I will send you a contribution envelope and an acknowledgement of your pledge this evening. If you are able to make your gift in the next few weeks, that would be wonderful, or you can indicate your preferred payment schedule on the envelope and send it back to the school. Again, on behalf of the school and the children, thank you for your very generous donation."*

Maybe: See "Possible Reactions and Recommended Responses to Phonathon Calls."

A Firm No: Although we would like to have 100% participation in this year's giving, it is important not to push those people who feel that they really can't or don't want to give. In that situation it is best to accept their position with a statement such as the following: *"I'm sorry you don't feel you can support the school in this way at this time. Thank you very much for your time."*

1997-98 LMS Annual Fund

Sample Phonathon Script for Soliciting Past Donors

The following is a suggested script for calling LMS parents who have contributed to the Annual Fund in previous years. We have found that the approach outlined below seems to work well, but please feel free to improvise.

Salutation/Opening Comments:

Since it is likely that you already know the individuals you are to call, and perhaps have even seen them recently (e.g., at the Class Potluck), it would be most natural to engage in some informal conversation with them before bringing up the Annual Fund. It is useful to plan the "small talk" you will use with each individual before you pick up the telephone. A more formal approach is outlined below.

"Hello. This is _______ calling on behalf of the Lexington Montessori School. My child _______ is in _______'s class along with (their child's name). I'm calling tonight to ask for a pledge to the LMS Annual Fund. Did you receive letters from Jana and Lisa telling parents about the fund and our hopes for this year? As you know, the Annual Fund is an important component of our annual operating budget. This year we are relying on its significant growth (refer to talking points). You've been so generous in donating to the Annual Fund in the past; can we count on you for a gift of $__________?"

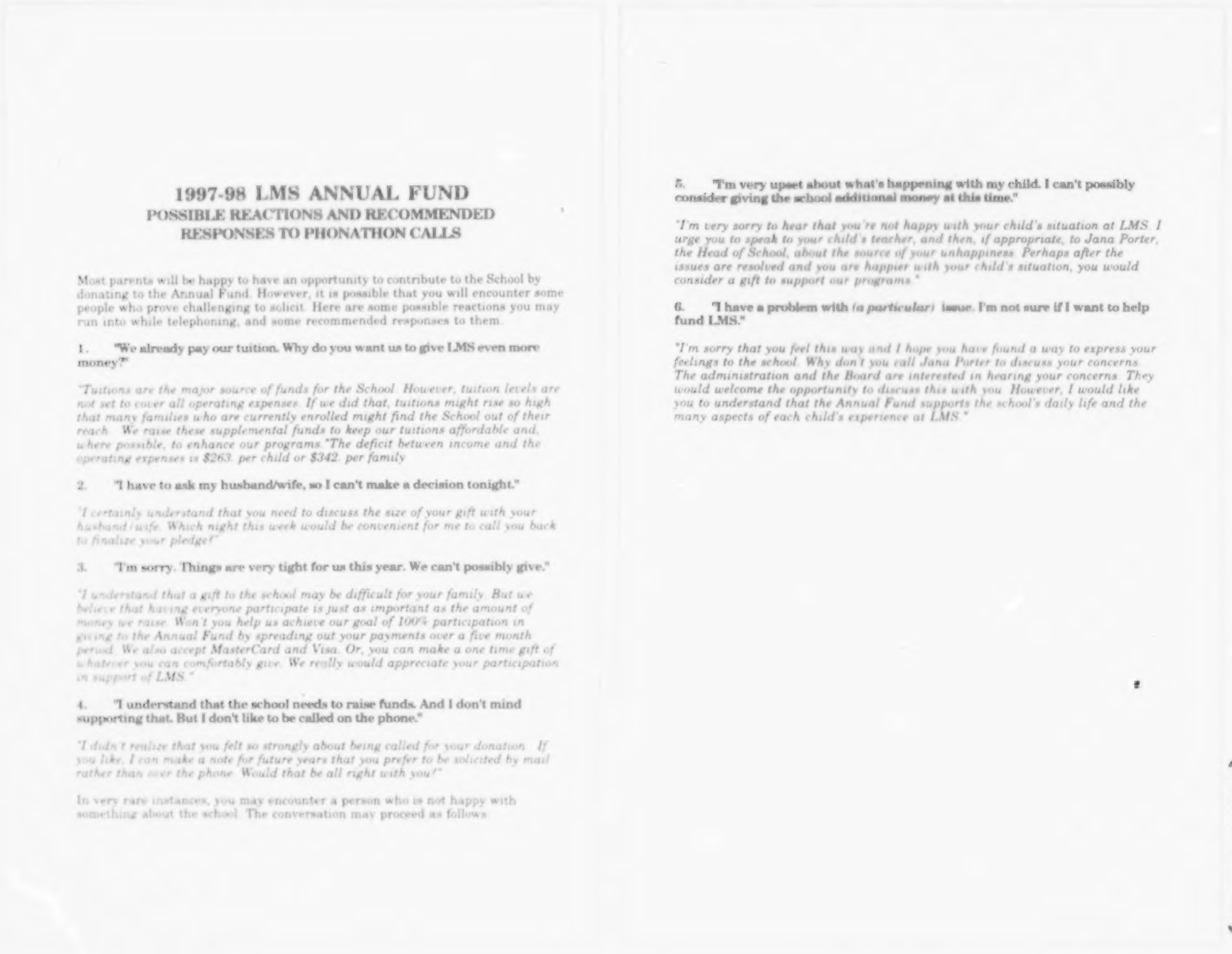
Closing Comments: If the answer is . . .

Yes: *"We really appreciate your help in supporting the school's programs. I will send you a contribution envelope and an acknowledgement of your pledge this evening. We'd appreciate it if you would send in your gift as promptly as possible. Again, on behalf of the school and the children, thank you for your very generous donation."*

Maybe: See "Possible Reactions and Recommended Responses to Phonathon Calls."

A Firm No: Although we would like to have 100% participation in this year's giving, it is important not to push those people who feel that they really can't or don't want to give. In that situation it is best to accept their position with a statement such as the following: *"I'm sorry you don't feel you can support the school in this way at this time. Thank you very much for your time."*

Annual Giving Packet, Lexington Montessori School (continued)



1997-98 LMS ANNUAL FUND

POSSIBLE REACTIONS AND RECOMMENDED RESPONSES TO PHONATHON CALLS

Most parents will be happy to have an opportunity to contribute to the School by donating to the Annual Fund. However, it is possible that you will encounter some people who prove challenging to solicit. Here are some possible reactions you may run into while telephoning, and some recommended responses to them.

1. **"We already pay our tuition. Why do you want us to give LMS even more money?"**

"Tuitions are the major source of funds for the School. However, tuition levels are not set to cover all operating expenses. If we did that, tuitions might rise so high that many families who are currently enrolled might find the School out of their reach. We raise these supplemental funds to keep our tuitions affordable and, where possible, to enhance our programs."The deficit between income and the operating expenses is $263. per child or $342. per family

2. **"I have to ask my husband/wife, so I can't make a decision tonight."**

"I certainly understand that you need to discuss the size of your gift with your husband/wife. Which night this week would be convenient for me to call you back to finalize your pledge?"

3. **"I'm sorry. Things are very tight for us this year. We can't possibly give."**

"I understand that a gift to the school may be difficult for your family. But we believe that having everyone participate is just as important as the amount of money we raise. Won't you help us achieve our goal of 100% participation in giving to the Annual Fund by spreading out your payments over a five month period. We also accept MasterCard and Visa. Or, you can make a one time gift of whatever you can comfortably give. We really would appreciate your participation in support of LMS."

4. **"I understand that the school needs to raise funds. And I don't mind supporting that. But I don't like to be called on the phone."**

"I didn't realize that you felt so strongly about being called for your donation. If you like, I can make a note for future years that you prefer to be solicited by mail rather than over the phone. Would that be all right with you?"

In very rare instances, you may encounter a person who is not happy with something about the school. The conversation may proceed as follows:

5. **"I'm very upset about what's happening with my child. I can't possibly consider giving the school additional money at this time."**

"I'm very sorry to hear that you're not happy with your child's situation at LMS. I urge you to speak to your child's teacher, and then, if appropriate, to Jana Porter, the Head of School, about the source of your unhappiness. Perhaps after the issues are resolved and you are happier with your child's situation, you would consider a gift to support our programs."

6. **"I have a problem with *(a particular)* issue. I'm not sure if I want to help fund LMS."**

"I'm sorry that you feel this way and I hope you have found a way to express your feelings to the school. Why don't you call Jana Porter to discuss your concerns. The administration and the Board are interested in hearing your concerns. They would welcome the opportunity to discuss this with you. However, I would like you to understand that the Annual Fund supports the school's daily life and the many aspects of each child's experience at LMS."

Annual Giving Packet, Lexington Montessori School (continued)

donations to schools?
Look inside—your gift could more than double!

Guide to Acknowledgements

An acknowledgement should be sent within 24 hours after your call. It is generally a good idea to personalize the pledge card with a handwritten "Thank you!" or similar note. Occasionally you may need to write a longer note; the small LMS stationery can be used for that purpose.

Jana will thank each family again when their gift is received.

Specific Pledge

Pledge card noting the amount of the pledge

Pledge envelope

Agree to Give: Amount Unspecified

Pledge card with amount left blank

Pledge envelope

Will Consider a Gift: no commitment

Pledge card with handwritten note saying "Thank you for considering a gift to the Annual Fund"

Pledge envelope

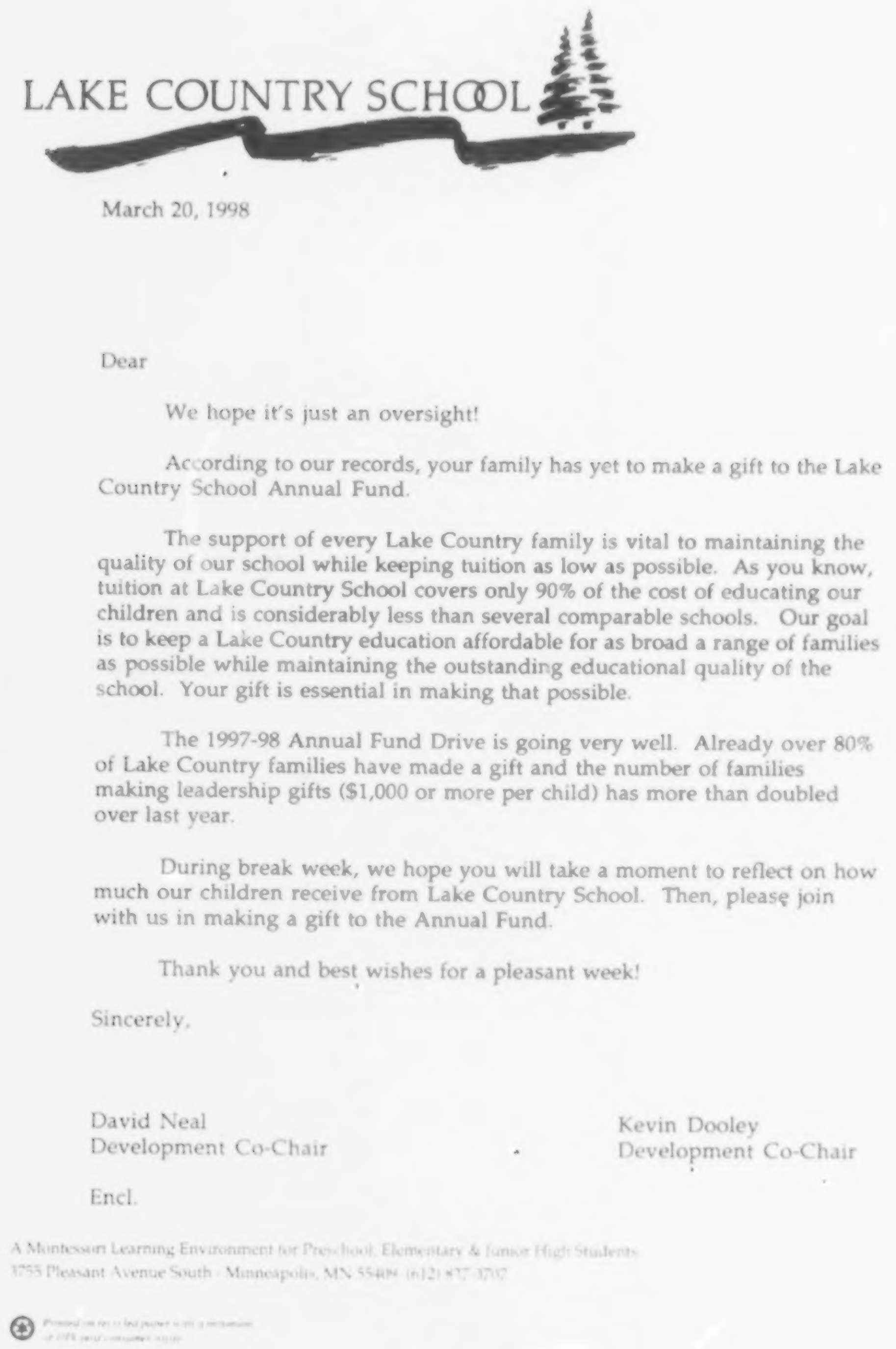
Firm No

No follow-up. However, please remember to let us know if the family has a concern that should be addressed by Jana or the teacher.

Bring to school to be mailed out.

Thank you

Follow-Up Letter, Lake Country School (Minneapolis, MN)



LAKE COUNTRY SCHOOL

March 20, 1998

Dear

We hope it's just an oversight!

According to our records, your family has yet to make a gift to the Lake Country School Annual Fund.

The support of every Lake Country family is vital to maintaining the quality of our school while keeping tuition as low as possible. As you know, tuition at Lake Country School covers only 90% of the cost of educating our children and is considerably less than several comparable schools. Our goal is to keep a Lake Country education affordable for as broad a range of families as possible while maintaining the outstanding educational quality of the school. Your gift is essential in making that possible.

The 1997-98 Annual Fund Drive is going very well. Already over 80% of Lake Country families have made a gift and the number of families making leadership gifts ($1,000 or more per child) has more than doubled over last year.

During break week, we hope you will take a moment to reflect on how much our children receive from Lake Country School. Then, please join with us in making a gift to the Annual Fund.

Thank you and best wishes for a pleasant week!

Sincerely,

David Neal
Development Co-Chair

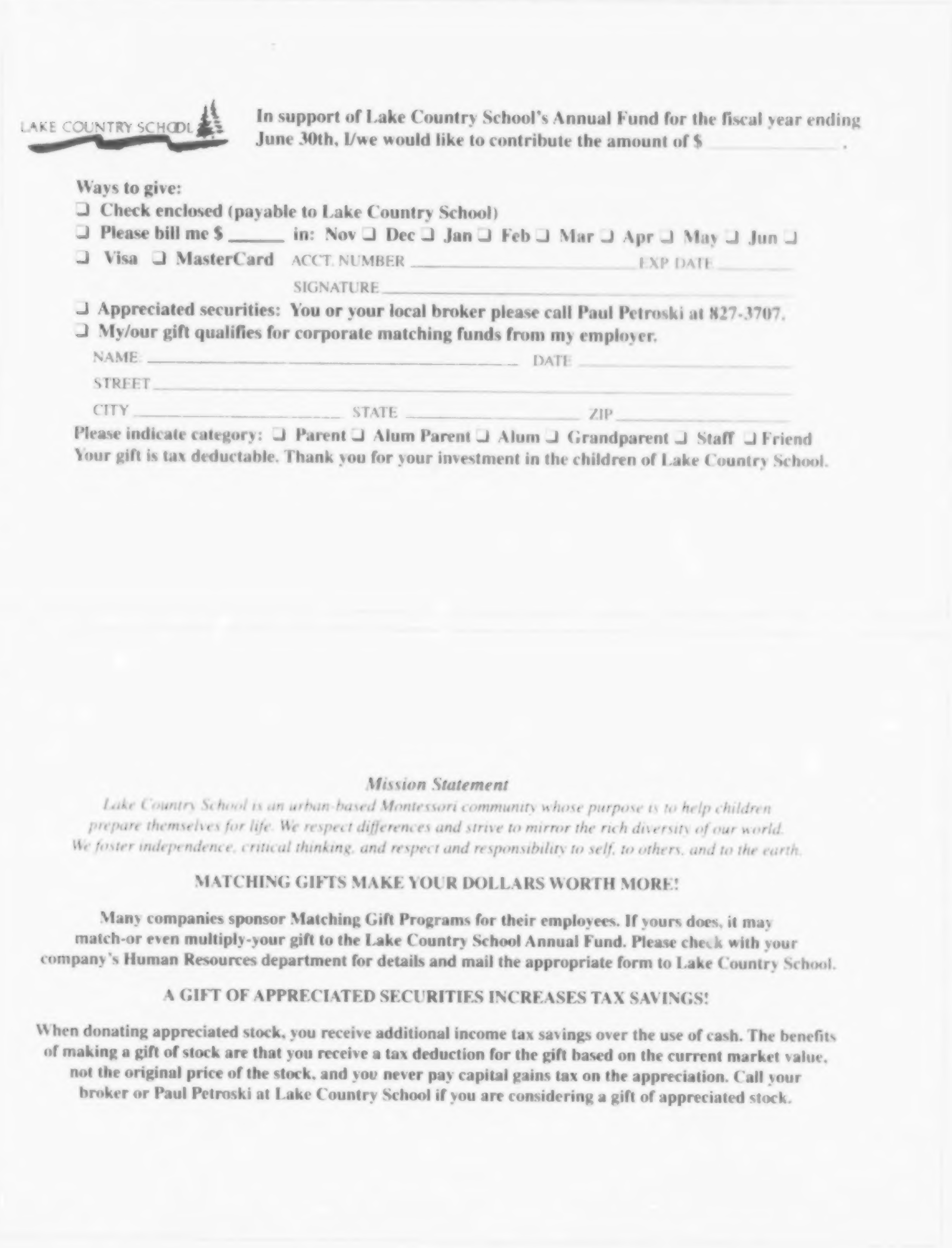
Kevin Dooley
Development Co-Chair

Encl.

A Montessori Learning Environment for Preschool, Elementary & Junior High Students
3755 Pleasant Avenue South · Minneapolis, MN 55409 (612) 827-3707

A very clever reminder letter to parents who have yet to contribute to the annual giving drive.

Pledge Card, Lake Country School (Minneapolis, MN)



LAKE COUNTRY SCHOOL

In support of Lake Country School's Annual Fund for the fiscal year ending June 30th, I/we would like to contribute the amount of $ ____________.

Ways to give:

☐ **Check enclosed (payable to Lake Country School)**

☐ **Please bill me $ ______ in: Nov ☐ Dec ☐ Jan ☐ Feb ☐ Mar ☐ Apr ☐ May ☐ Jun ☐**

☐ **Visa** ☐ **MasterCard** ACCT. NUMBER ____________________ EXP DATE ________

SIGNATURE ______________________________

☐ **Appreciated securities: You or your local broker please call Paul Petroski at 827-3707.**

☐ **My/our gift qualifies for corporate matching funds from my employer.**

NAME ______________________ DATE ____________

STREET ______________________________

CITY ____________ STATE ____________ ZIP ____________

Please indicate category: ☐ **Parent** ☐ **Alum Parent** ☐ **Alum** ☐ **Grandparent** ☐ **Staff** ☐ **Friend**

Your gift is tax deductable. Thank you for your investment in the children of Lake Country School.

Mission Statement

Lake Country School is an urban-based Montessori community whose purpose is to help children prepare themselves for life. We respect differences and strive to mirror the rich diversity of our world. We foster independence, critical thinking, and respect and responsibility to self, to others, and to the earth.

MATCHING GIFTS MAKE YOUR DOLLARS WORTH MORE!

Many companies sponsor Matching Gift Programs for their employees. If yours does, it may match-or even multiply-your gift to the Lake Country School Annual Fund. Please check with your company's Human Resources department for details and mail the appropriate form to Lake Country School.

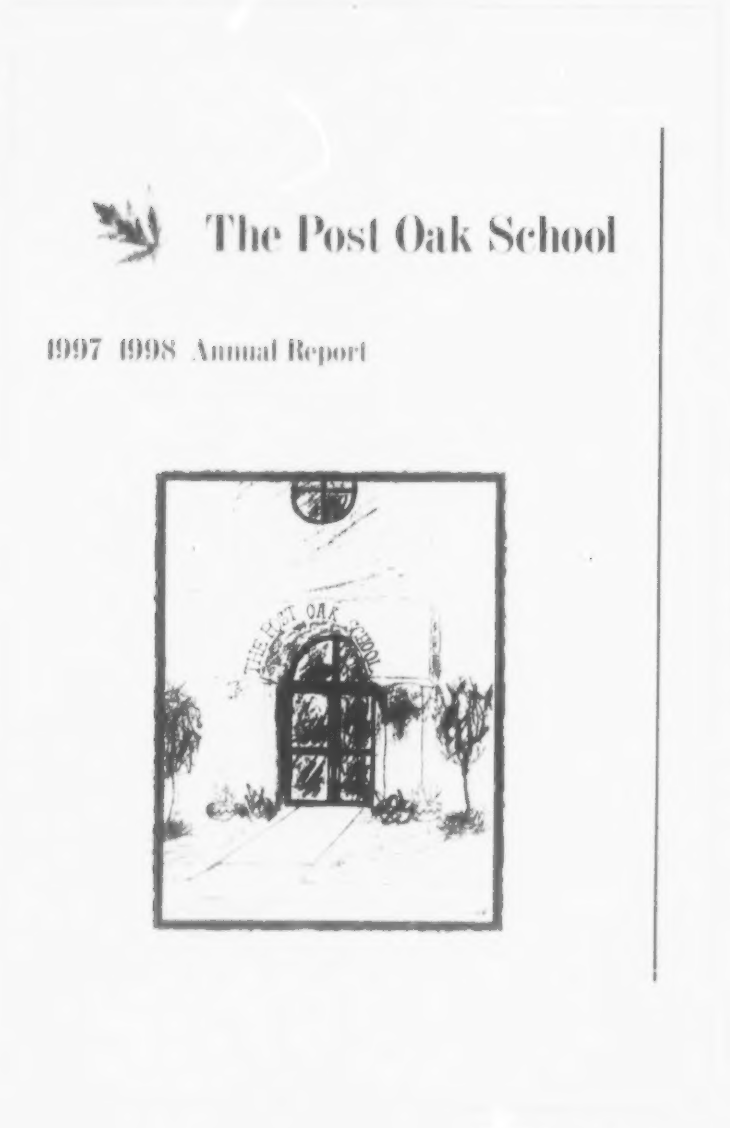
A GIFT OF APPRECIATED SECURITIES INCREASES TAX SAVINGS!

When donating appreciated stock, you receive additional income tax savings over the use of cash. The benefits of making a gift of stock are that you receive a tax deduction for the gift based on the current market value, not the original price of the stock, and you never pay capital gains tax on the appreciation. Call your broker or Paul Petroski at Lake Country School if you are considering a gift of appreciated stock.

This pledge card includes payment options as well as different giving options. A self-addressed envelope could be enclosed.

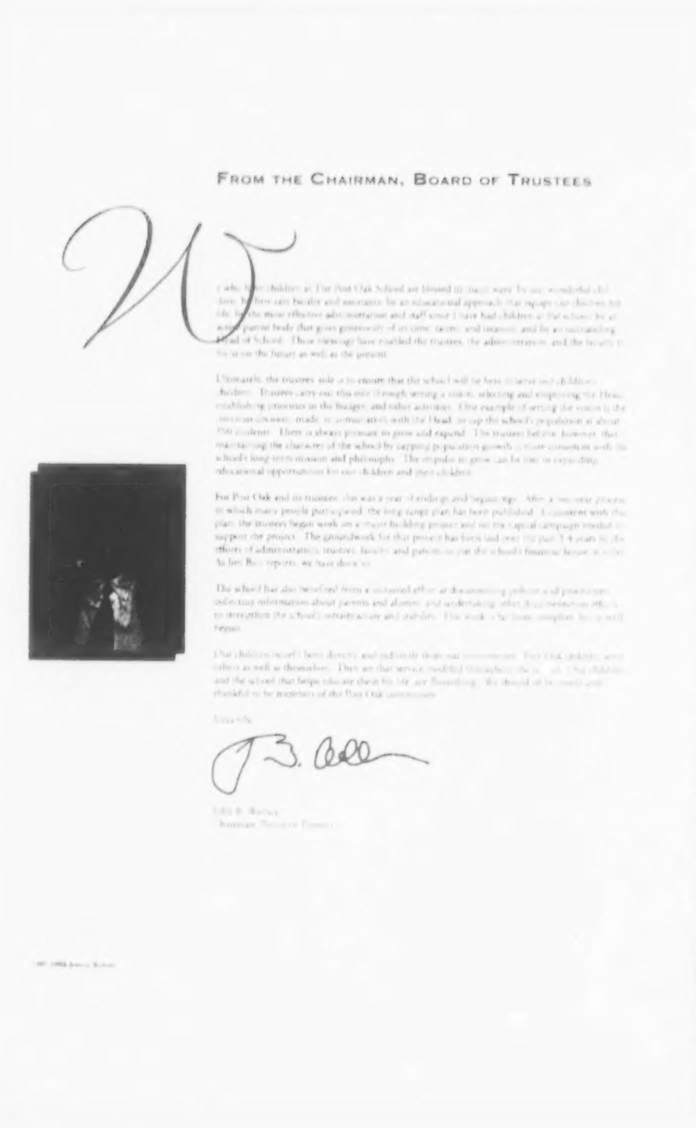
Annual Report, The Post Oak School (Bellaire, TX)

This annual report represents a school at maturity. A younger school might have a much less elaborate annual report.



The Post Oak School

1997 1998 Annual Report



FROM THE CHAIRMAN, BOARD OF TRUSTEES

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Annual Report, The Post Oak School (continued)

FROM THE HEAD OF SCHOOL

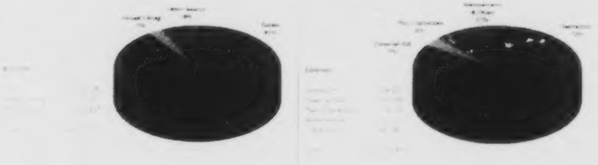
"The child is
both a **hope**
and a
promise
to mankind."

FROM THE BUSINESS MANAGER

[illegible]

[illegible]

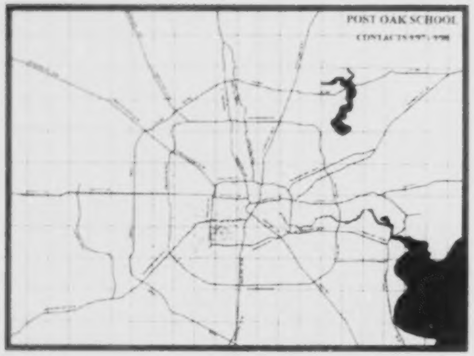
[illegible] 1997-98 Fiscal Year [illegible]



FROM THE DIRECTOR OF ADMISSION

[illegible]

[illegible]


POST OAK SCHOOL
CONTACTS 1997-1998

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Annual Report, The Post Oak School (continued)

FROM THE DIRECTOR OF DEVELOPMENT

THE POST OAK SCHOOL 1997-1998
ANNUAL FUND CAMPAIGN

We wish to thank all current and past parents, grandparents, friends, faculty, staff, corporations and foundations for their generous support.

The Annual Fund is comprised of unrestricted funds received between July 1, 1997 and June 30, 1998.

Donors to the Annual Fund are listed both by giving level and alphabetically. Some donors wished to be listed only alphabetically.

Principal for a Day

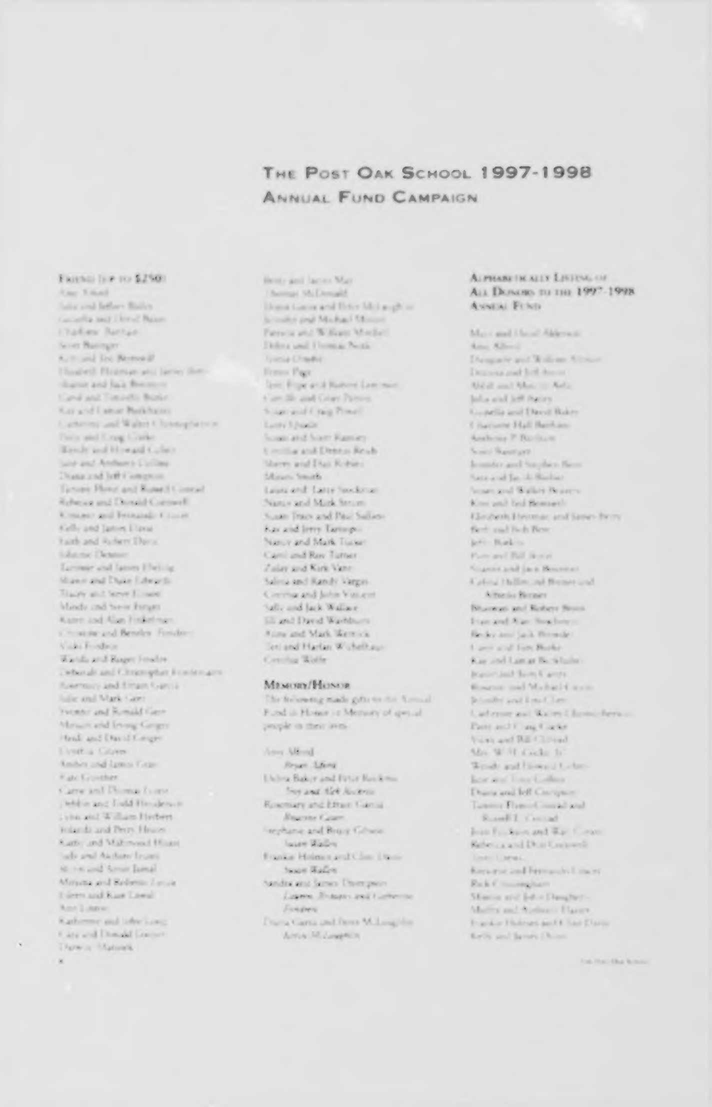
CHAMPION ($5000 AND ABOVE)

PATRON ($2,000-$2,999)

SPONSOR ($1,000-$1,999)

SUPPORTER ($500-$999)

BENEFACTOR ($250-$499)



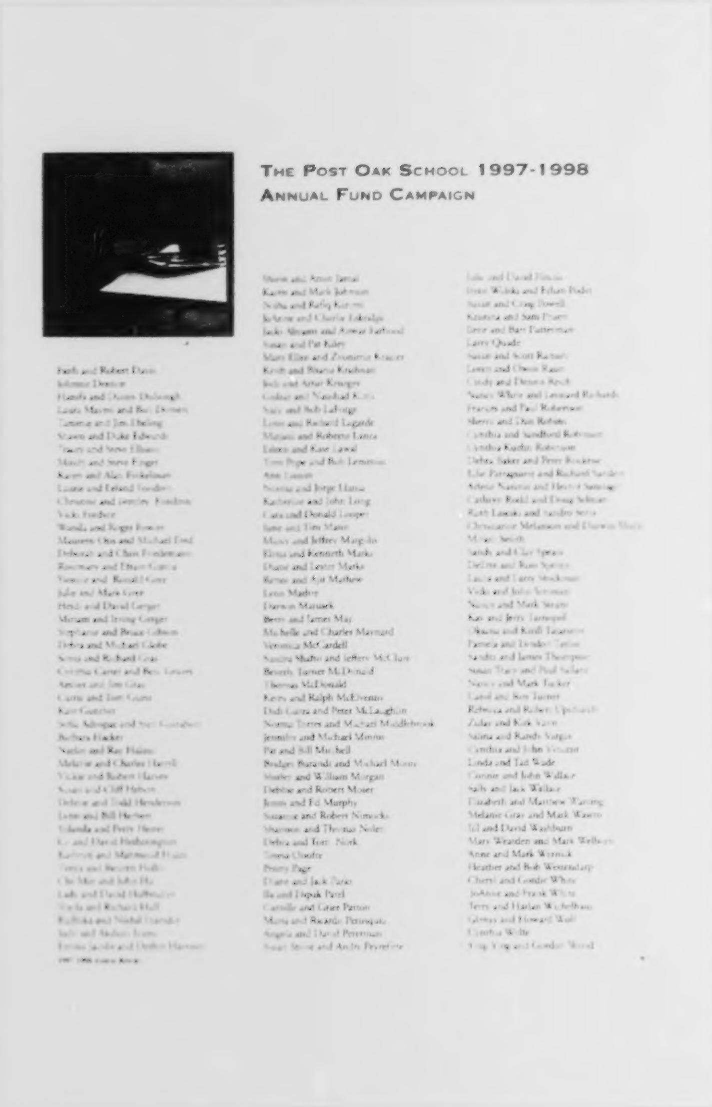
THE POST OAK SCHOOL 1997-1998
ANNUAL FUND CAMPAIGN

FRIEND (UP TO $250)

ALPHABETICALLY LISTING OF ALL DONORS TO THE 1997-1998 ANNUAL FUND

MEMORY/HONOR

The following made gifts to the Annual Fund in Honor or Memory of special people in their lives.



THE POST OAK SCHOOL 1997-1998
ANNUAL FUND CAMPAIGN

Annual Report, The Post Oak School (Continued)

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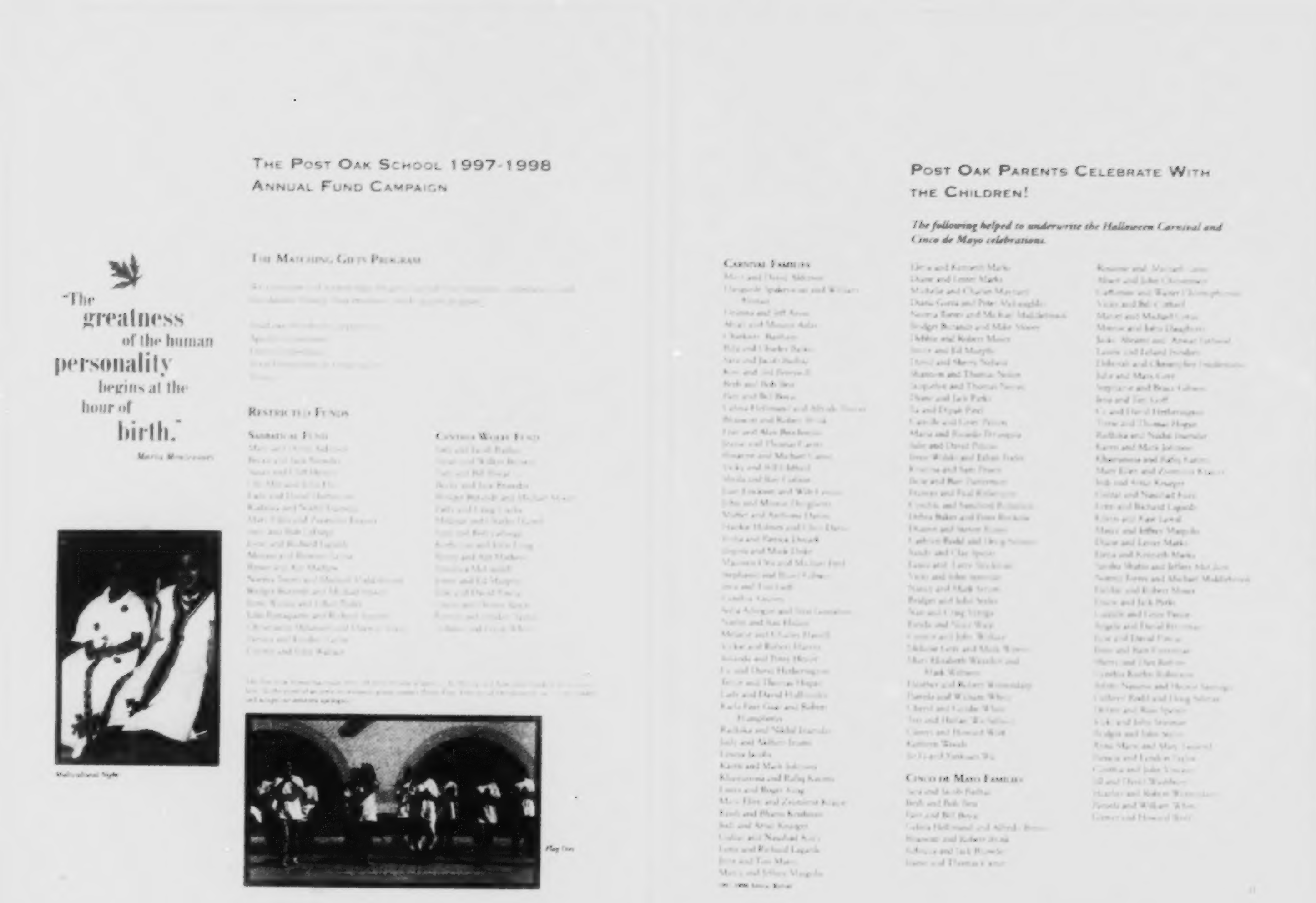
Annual Report, The Post Oak School (continued)



THE POST OAK SCHOOL 1997-1998 ANNUAL FUND CAMPAIGN

"The greatness of the human personality begins at the hour of birth."

Maria Montessori

THE MATCHING GIFTS PROGRAM

RESTRICTED FUNDS

SABBATICAL FUND

POST OAK PARENTS CELEBRATE WITH THE CHILDREN!

The following helped to underwrite the Halloween Carnival and Cinco de Mayo celebrations.

CARNIVAL FAMILIES

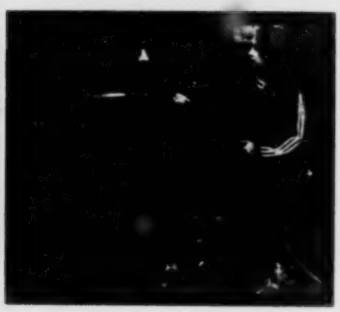
CINCO DE MAYO FAMILIES

Annual Report, The Post Oak School (continued)

MISSION STATEMENT

The mission of The Post Oak School, as an accredited AMI (Association Montessori Internationale) school, is to provide a superior Montessori environment and dynamic learning experiences which are designed according to the developmental characteristics and needs of children; to guide and nurture each child—intellectually, socially, and emotionally.

Pennies for Peace



1997-1998 SCHOOL BOARD

Scott Basinger
Beth Best
Jeffri Botkin
Pam Boyar
Jeanie Carter
Leo Chen
Leland Fondren, Chair
Sheila Hull
Naushad Kurji
Lynn Mathre
William Morgan
Jenny Murphy
Leonard Richards
John Wallace

HEAD OF SCHOOL
John Long

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Amy Alford
Alma Armendariz
Mirna Andrade-Salgado
Jim Barr
Sharon Boynton
Kay Burkhalter
Milagro Chavez
Patty Clarke
Ana Cornejo
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Norma Paulin
Deborah Poisot
Larry Quade
Shelly Rodriguez
Mirani Smith
Susan Tracy
Patricia Tran
Mark Tucker
Carol Turner
Salina Vargas
Miriam Winton
Cynthia Wolfe

Capital Campaigns

Introduction

A capital campaign solicits a one-time gift of greater significance to the school, usually for some extraordinary capital item: a new classroom, property acquisition, a building rehabilitation, etc. A capital gift falls outside of annual operations. It is not included in the annual cycle of school revenues and expenses.

See chapter 3 for a discussion of operational revenues and expenses

Any capital campaign needs preliminary design and planning. Ideally, it emerges out of a strategic or Long-Range Plan that already has the Board's approval. On the other hand, the occasion for a major capital campaign may be the first time a school sees the need for a Long-Range Plan.

See Chapter 15 for information on the Long-Range Plan

For an expansion campaign (whether expanding to accommodate a new age level or to add classrooms at existing age levels), the first steps include a rationale in terms of the Montessori program, a space utilization or architectural plan, and financial projections.

See Chapter 5 for information on architectural plans.

The one-time nature of the capital drive should be dramatized by a discrete brochure giving the history of why the school needs this one-time gift, the nature of the project being funded, the relationship to the Long-Range Plan, and a financial overview of what gifts are needed to provide for the anticipated budget of the project. This brochure can be as simple as a three-fold, 8½ x 11 self-mailer or as elaborate as a four-color booklet. What must be communicated emphatically is that this capital drive is an inevitable part of the school's success and that it is important enough to ask for a one-time gift *in addition to* annual giving.

In keeping with the evolving vision of a Montessori school, a capital campaign should build on Montessori vision. Adding a program level means augmenting the Montessori continuum. Unifying the campus means a greater sense of community and program cohesion. All of the literature surrounding the campaign should emphasize a Montessori-specific rationale for the expansion, making a strong case not only for the building or property itself but for the Montessori approach overall.

Feasibility Study

If the school is raising a very large sum (several hundred thousand dollars), it should demonstrate the feasibility of significant giving to make sure the goal is realistic. A feasibility study is sometimes conducted by a professional funds development firm, which will directly assess future donors as well as every family in the school. The same process could be conducted by the board of trustees.

The feasibility study should also entail enrollment and financial projections, with a clearly articulated path as to how much is to be obtained through a mortgage and how much must be raised up front. It is important that current families assume an adequate share of the responsibility and not over-encumber the school for future generations. Often this fiscal balancing act between up-front funds development and long-term mortgage must be addressed firmly by the head of school. If the mortgage payment each year strangles operations with high space costs, the school loses the ability to pay staff adequate salaries and to operate with a margin of flexibility. If the board votes for a high mortgage rather than a pay raise for teachers, program quality can suffer. Space costs, including mortgage, utilities, maintenance, etc., should not exceed 20%-25% of the total budget (see Projecting Capital Needs, below).

Projected Enrollment vs. Capacity

Program	School Year																	
	1999-2000 (current)			2000-2001			2001-2002			2002-2003			2003-2004			2004-2005		
	proj	cap	%cap	proj	cap	% cap	proj	cap	%cap	proj	cap	%cap	proj	cap	%cap	proj	cap	%cap
Toddler	12	18	67%	16	18	89%	18	18	100%	18	18	100%	18	18	100%	18	18	100%
3-6: All-Day	24	24	100%	24	24	100%	24	24	100%	24	24	100%	24	24	100%	24	24	100%
3-6: Trad. Day	111	125	89%	118	125	94%	121	125	97%	125	125	100%	125	125	100%	125	125	100%
3-6: Ext. Day	32	40	80%	33	40	83%	38	40	95%	40	40	100%	40	40	100%	40	40	100%
Gr. 1	16			26			25			25			25			25		
Gr. 2	7			14			17			20			21			21		
Gr. 3	2			6			9			14			18			18		
Gr. 4										7			11			12		
Gr. 5													6			10		
Gr. 6																4		
All Elem.	25	25	100%	46	50*	92%	51	50	102%	66	75	88%	81	75	108%	90	75	120%**
Total	172			204			214			233			248			257		
Growth rate	10.6%			18.6%			4.9%			8.9%			6.4%			3.6%		

Attrition assumptions:

- Each class loses two students per grade level or a total of six per year.
- Retention from third-year preschool to first-year elementary is 70%.
- Retention from third-year elementary to fourth-year elementary is 80%.

*Projected expansion of elementary space, with addition of one teacher. Maximum elementary enrollment is 75 based on space, but only 50 based on existence of two lower-elementary classrooms (grades 1-3). Maximum elementary enrollment reaches 75 in 2002-2003 with hiring of an upper elementary teacher (grades 4-6).

**Indicates possible need for another expansion.

Figure 1.

Current Year's Tuition Income

Program	Tuition	Enrollment	Income
Toddler	$2,950	12	$35,400
3-6: All-Day (includes Children's House tuition)	$5,000	24	$120,000
3-6: Trad. Day (Children's House only)	$2,700	111	$299,700
3-6: Extended Day (add to Trad. Day tuition)	$750	32	$24,000
Elementary	$4,550	25	$113,750
		Total Tuition Income	$592,850
		Total Income Potential	$654,350
		% of Potential	90.6%

Figure 2

Projecting Capital Needs

In all cases of capital campaign planning, enrollment and financial projections are an indispensable part of feasibility and development. Financial projections, already maintained by some schools as an ongoing practice in order to clarify short-term goals, now must be put into a long-range perspective that includes the expansion costs, with more refined assumptions and figures.

Step One: Projecting Enrollment and Revenues

With the assistance of spreadsheet software, enrollment projections can be set up easily to reflect any number of scenarios. The first step is to project enrollment over the next five years and compare it to capacity, including the increased capacity that will result from the proposed expansion (see Figure 1). As contrasted with simple enrollment projections (see chapter 3), this enrollment-vs.-capacity spreadsheet demonstrates under- or over-utilization of space in clear numbers. Where enrollment projections are more than capacity, the percentages clearly tell the story of needed expansion.

To generate the enrollment-vs.-capacity spreadsheet, first look at previous enrollment for at least two years, comparing actuals to projections in order to determine the assumptions that will be used for estimating attrition.

See Chapter 3 for a complete discussion of attrition rates

Show the current year's enrollment plus five-year enrollment projections. For each year, give maximum enrollment capacity according to available space and/or teachers. Finally, show a percentage of capacity for each age level. In Figure 1, projected enrollments at the elementary level are broken down by specific grade in order to demonstrate the phasing-in of the program, but the space for the elementary program is considered in its totality, not by specific grade, because multiple grades will be mixed in the classrooms.

Next, show a chart of the current year's tuition levels, indicating actual income based on current enrollment as well as potential income if enrollment were at 100% for all programs (see Figure 2).

Percent Tuition Increase

Year	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
% Increase over Previous Year	6%	8%	8%	6%	6%	6%

Figure 3.

See Chapter 3 for a complete discussion of how to set tuition levels and increases.

Show percentage tuition increases relative to anticipated personnel costs and inflation (see Figure 3). Include the current year's increase over the previous year for comparison. In this example, tuition will rise by a higher factor during the first two years of the expansion and then level off to the previous rate of 6% per year (however, it is usually advisable to keep tuition increases constant even during a capital campaign).

To project revenue, multiply anticipated tuition (based on percentage increases from Figure 2) for each level by projected enrollment at each level (see Figure 4).

Projected Tuition Income

Program	School Year					
	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
% Tuition Increase	6%	8%	8%	6%	6%	6%
Toddler	$35,400	$50,976	$61938	$65,646	$69,588	$73,764
All-Day	$120,000	$129,600	$139,968	$148,368	$157,272	$166,704
Preschool	$299,700	$344,088	$381,029	$417,250	$442,375	$468,875
Ext. Day	$24,000	$26,730	$33,250	$37,080	$39,320	$41,680
Elementary	$113,750	$226,044	$270,657	$371,316	$483,084	$568,890
Total Tuition Income	**$592,850**	**$777,438**	**$886,841**	**$1,039,660**	**$1,191,639**	**$1,319,913**

Figure 4.

Step Two: Projecting Capital Costs

With projected enrollment and tuition levels established, it is time to estimate the cost of the proposed expansion. At this point in the process, it might also be well to determine whether there might be a need to expand any of the school's programs relative to market demand, above and beyond the enrollment projections. For instance, in the example above, the Projected Enrollment vs. Capacity chart (Figure 1) shows the preschool and infant-toddler levels at capacity for several years in a row. This school might choose to expand these areas as well as the elementary, if it is determined that the local market will support such an expansion.

After the board approves the enrollment expansion and space plan, then it will be possible to anticipate the approximate cost of the building expansion and to budget for these costs. At the beginning of an expansion drive, projected "sources and uses" indicate two budget scenarios, based on planned expenses and worst-case expenses, assuming that expenses cannot be projected firmly until later in the process (see Figure 5). Looking at projected expenses will help to determine how much mortgage (debt service) the school should anticipate in its annual operations. If expenses are more than planned, the strategy should be to rely on increased fundraising, keeping any mortgage increase to a minimum.

Expansion: Estimated Uses and Sources, Showing Increased Fundraising to Offset Worst-Case Expenses
(in thousands of dollars)

USES	Planned		Worst-Case	
Construction	$772		$850	
Contingency (15% of construction costs)	$116		$128	
Total Construction + Contingency		$888		$978
Furnishings/Equipment		$46		$50
Land		$78		$80
Architect		$66		$70
Construction Management		$70		$72
Legal Fees		$10		$12
Interest During Construction		0		0
TOTAL USES		**$1,158**		**$1,262**
SOURCES				
School Community:				
Major Donors	$45		$50	
Expansion Giving	$65		$70	
Events	$22		$28	
Total School Community		$132		$148
Donations for Furniture/Equipment		$46		$50
Major Benefaction		$480		$500
Foundations		$255		$265
Financing (Mortgage)		$250		$300
TOTAL SOURCES		**$1,163**		**$1,263**
Shortfall or Surplus (Uses less Sources)		**$5**		**$1**

Figure 5.

Step Three: Projecting Annual Operating Budgets

The Starting Point: The Current Year's Income and Expenses

Make a spreadsheet of the current year's income from all sources (see Figure 6). Omit fundraising, however, because fundraising should be kept separate from operations, especially at a school mature enough to begin a capital campaign. As a rule, estimate income low and expenses high in order to allow for any unforeseen circumstances.

Likewise, make spreadsheets for the current year's expenses (see Figures 7-11). A convenient way to classify expenses is to use the categories Personnel, Supplies, Space, and Administrative.

Current Year's Income (1999-2000)

Source	Amount
Tuition—Academic Year	$592,850
Application Fees	$8,960
After-School Elem. Program Fees	$97,846
Donations	$0
Investment Interest	$18,640
Misc. Income	$750
Penalty—Late Pick-Up	$1,380
Penalty—Late Payment	$900
Returned Check Fee	$120
Summer Tuition	$22,920
Summer Child Care	$15,416
Total Receipts	**$759,782**

Figure 6.

Personnel Expenses (1999-2000)

Category	Amount
Salaries	$455,050
Sick Leave (Substitutes)	$19,568
Special Programs Salaries	$7,004
Payroll Taxes (all salaries X 7.5%)	$36,122
Summer Salaries	$27,172
Summer Payroll Taxes	$2,038
Employee Education	$7,832
Benefits	$45,505
Staff Tuition Discount	$22,650
Total Personnel Expenses	**$622,941**

Figure 7.

Supplies Expenses (1999-2000)

Category	Explanation	Amount
Art & Expendable	Replaceable supplies, petty cash	$4,430
After-School Materials		$600
Classroom Materials		$10,260
Copies & Laminating	Lease, service, supplies	$9,520
Furniture/Equipment		$3,604
Juice/Snack		$2,444
Library		$400
Office Supplies/Equipment	Leases, service, purchases	$4,252
Paper Products	Bond, cups, towels, toilet paper, etc.	$5,076
Total Supplies Expenses		**$40,586**

Figure 8.

See Chapter 3 for more information on income and expense breakdowns.

Space Expenses (1999-2000)

Category	Explanation	Amount
Building Maintenance		$3,148
Utilities		$18,246
Garbage Service		$1,464
Grounds Maintenance		$10,092
Janitorial Service		$12,140
Mortgage Payment	(mortgage payment starts in 2000-2001)	$0
Total Space Expenses		**$45,090**

Figure 9.

Administrative Expenses (1999-2000)

Category	Explanation	Amount
Accounting		$8,646
Advertising		$2,250
Dues/Licenses	National, local organizations, city, etc.	$6,216
Insurance	Liability, building, etc.	$20,140
Legal Services		$500
Misc. Expenses		$395
Parent Education	Books, videos, etc.	$1,092
Postage/Shipping		$932
Publications/Newsletter		$896
Scholarships		$5,600
Phone		$1,908
Total Administrative Expenses		**$48,575**

Figure 10.

Revenues over Expenses (1999-2000)

Grand Total Expenses	**$757,192**
Total Revenues	**$759,782**
Revenues Over Expenses	**$2,590**

Figure 11.

Growth Factors: Expense Percent Increases

Now that the current year's income and expenses have been calculated, five-year projections can be made based on the current year's figures (tuition projections were already made in Figure 4, above). A chart summarizing expense increase factors helps to clarify assumptions for the purpose of projecting expenses (see Figure 12).

- **Space Expansion** is based on the increase in square footage as a result of the expansion project. It needs to be taken into account in the year in which the expansion is to occur.
- **Enrollment growth rate** and **percent tuition increase** were calculated earlier, in Figs. 1 and 3 above.
- The **inflation rate, utilities increase,** and **insurance increase** are based on current local trends; in general, utilities and insurance rise faster than general inflation.
- See Chapter 3 for a thorough discussion of **payroll increases.** The example below uses 6% per year for the sake of simplicity. Later in the process, additional staff for the

Expense Increase Factors

Category	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
Space Expansion	0%	65%	0%	0%	0%	0%
Enrollment Growth	10.6%	18.6%	4.9%	8.9%	6.4%	3.6%
Tuition Percent Incr.	6%	8%	8%	6%	6%	6%
Inflation Rate	4%	4%	4%	4%	4%	4%
Utilities Increase	5%	5%	5%	5%	5%	5%
Insurance Increase	10%	10%	10%	10%	10%	10%
Payroll Increase	6%	6%	6%	6%	6%	6%

Figure 12.

expansion will be included at an estimated competitive salary; the percent increase here applies to existing salaries only.

Projected Budgets

The first step in projecting a five-year budget is to project receipts (income) over the next five years (see Figure 13). Projected academic-year tuition has already been calculated in Figure 4 (the line item labeled "Total Tuition Income").

Receipts from fees other than academic-year tuition will increase by the enrollment growth rate (from Figure 12) *as well as* the actual fee increase, if any. In Figure 13, it is assumed that application fees, penalties, and the returned check fee will not increase over the next five years. Therefore receipts from these sources are simply increased each year by the enrollment growth rate.

On the other hand, it is assumed that after-school fees, summer tuition, and summer child care will increase by the same percentage as the tuition increase (shown in Figure 12). It is further assumed (although this may not be the case at every school) that enrollment in all of these programs will increase at the same rate as the academic-year enrollment growth rate. Therefore receipts from these sources must be multiplied by the enrollment growth rate for each year *and then* by the tuition percent increase.

Projected Receipts

Category	Assumption	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
Tuition—Academic Year	from Fig. 4	$592,850	$777,438	$886,841	$1,039,660	$1,191,639	$1,319,913
Application Fees	no fee incr.	$8,960	$10,627	$11,147	$12,139	$12,916	$13,381
After-School Fees	incr.=tuition incr.	$97,846	$125,329	$141,988	$163,902	$184,855	$203,001
Donations	none	$0	$0	$0	$0	$0	$0
Investment Interest	no increase	$18,640	$18,640	$18,640	$18,640	$18,640	$18,640
Misc. Income	no increase	$750	$750	$750	$750	$750	$750
Penalty—Late Pick-Up	no fee incr.	$1,380	$1,637	$1,717	$1,870	$1,989	$2,061
Penalty—Late Payment	no fee incr.	$900	$1,067	$1,120	$1,219	$1,297	$1,344
Returned Check Fee	no fee incr.	$120	$142	$149	$162	$173	$179
Summer Tuition	incr.=tuition incr.	$22,920	$29,358	$33,260	$38,393	$43,302	$47,552
Summer Child Care	incr.=tuition incr.	$15,416	$19,746	$22,371	$25,823	$29,125	$31,984
Total Receipts		$759,782	$984,734	$1,117,983	$1,302,558	$1,484,686	$1,638,805

Figure 13.

Projected Personnel Expenses

Category	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
Salaries	$455,050	$542,647	$575,206	$677,465	$718,113	$761,199
Sick Leave (Substitutes)	$19,568	$23,335	$24,735	$29,132	$30,880	$32,733
Special Programs Salaries	$7,004	$14,848	$15,739	$22,245	$23,580	$24,994
Payroll Taxes (all salaries x 7.5%)	$36,122	$43,562	$46,176	$54,663	$57,943	$61,419
Summer Salaries	$27,172	$28,802	$30,530	$43,149	$45,738	$48,482
Summer Payroll Taxes	$2,038	$2,160	$2,290	$3,236	$3,430	$3,636
Employee Education	$7,832	$9,165	$9,529	$11,011	$11,452	$11,910
Benefits (10% of salaries)	$45,505	$54,265	$57,521	$67,747	$71,811	$76,120
Staff Tuition Discount	$22,650	$27,520	$29,721	$35,006	$37,106	$39,333
Total Personnel Expenses	**$622,941**	**$746,302**	**$791,447**	**$943,654**	**$1,000,053**	**$1,059,826**

Assumptions:

- One elementary teacher and one assistant are added in the 2000-2001 year. Special programs personnel double to accommodate 2 elementary classes.
- One elementary teacher and one assistant are added in the 2002-2003 year. Summer staff are also increased. Special programs personnel increase by a factor of 1.5 as the elementary program grows from 2 classes to 3.

Figure 14.

Projected Supplies Expenses

Category	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
Art & Expendable	$4,430	$5,464	$5,961	$6,751	$7,471	$8,049
After-School Materials	$600	$740	$807	$914	$1,012	$1,090
Classroom Materials	$10,260	$12,655	$13,806	$15,636	$17,303	$18,642
Copies & Laminating	$9,520	$11,742	$12,810	$14,509	$16,055	$17,298
Furniture/Equipment	$3,604	$4,445	$4,850	$5,493	$6,078	$6,548
Juice/Snack	$2,444	$3,015	$3,289	$3,725	$4,122	$4,441
Library	$400	$493	$538	$610	$675	$727
Office Supplies/Equipment	$4,252	$5,245	$5,722	$6,480	$7,171	$7,726
Paper Products	$5,076	$6,261	$6,830	$7,736	$8,560	$9,223
Total Supplies Expenses	**$40,586**	**$50,060**	**$54,614**	**$61,854**	**$68,445**	**$73,745**

Figure 15.

For the sake of simplicity, Figure 13 shows miscellaneous income and investment interest remaining the same over the next five years. Individual schools must determine what assumptions they will use for projecting these items.

Next, project expenses (Figure 14) using the inflation and percent increase factors from Figure 12. It is helpful at this point to list all staffing increases associated with the expansion project so that salaries for the new staff can be added in the appropriate years (see assumptions for Figure 14). Line items utilize the percentage increase factors from Figure 12 as follows:

- **Salaries** (both academic year and summer) reflect the salary increase factor plus salaries added for new positions created by the expansion.
- **Sick leave** (salaries for substitutes) is increased each year by the salary increase factor.
- **Special programs salaries** (art, music, gym, etc.) reflect the salary increase factor plus salaries added for new positions created by the expansion. In the example below, it is assumed that special programs are used at the elementary level only (which may not be the case for all schools).

Projected Space Expenses

Category	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
Building Maintenance	$3,148	$5,402	$5,618	$5,843	$6,076	$6,320
Utilities	$18,246	$31,611	$33,192	$34,851	$36,594	$38,424
Garbage Service	$1,464	$2,512	$2,613	$2,717	$2,826	$2,939
Grounds Maintenance	$10,092	$17,318	$18,011	$18,731	$19,480	$20,259
Janitorial Service	$12,140	$20,832	$21,666	$22,532	$23,433	$24,371
Mortgage Payment	$0	$37,596	$37,596	$37,596	$37,596	$37,596
Total Space Expenses	**$45,090**	**$115,271**	**$118,695**	**$122,270**	**$126,006**	**$129,908**

Figure 16.

- **Employee education** increases by the inflation factor from Figure 12 as well as by the increase in number of faculty due to the expansion.
- **Staff tuition discount** increases in proportion to the number of faculty and by the tuition percent increase from Figure 12.

Expenses for supplies (Figure 15) increase by the enrollment growth rate as well as by the inflation factor (both from Figure 12).

Space expenses (Figure 16) increase by the percentage of space expansion and also by the applicable inflation factor (recall that utilities rise faster than general inflation; see Figure 12). The new debt service costs (mortgage payments) are added in the applicable year (in this example, payments on $300,000 borrowed at 9.5% over 15 years begin in 2000-2001).

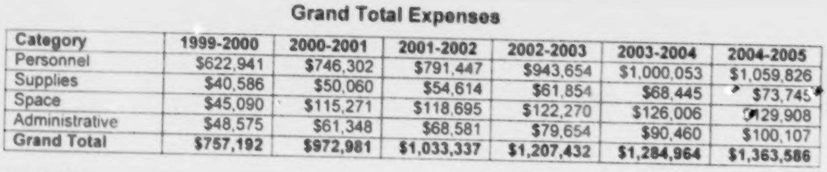
Administrative expenses (Figure 17) increase according to enrollment growth as well as by inflation (insurance rises faster than general inflation; see Figure 12). However, as enrollment grows, the percentage of the total budget allocated to administrative expenses should decrease.

With total expenses calculated in Figure 18 and total revenues in Figure 13, it is now possible to project total revenues over expenses (Figure 19). This step demonstrates program solvency—that is, whether or not operations will support the debt service. In the example below, the surpluses in later years might be used to expand the preschool program and/or to add another elementary class.

Projected Administrative Expenses

Category	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
Accounting	$8,646	$10,664	$11,634	$13,177	$14,581	$15,710
Advertising	$2,250	$2,775	$3,028	$3,429	$3,794	$4,088
Dues/Licenses	$6,216	$7,667	$8,364	$9,473	$10,483	$11,295
Insurance	$20,140	$26,275	$30,318	$36,318	$42,507	$48,441
Legal Services	$500	$617	$673	$762	$843	$909
Misc. Expenses	$395	$487	$532	$602	$666	$718
Parent Education	$1,092	$1,347	$1,469	$1,664	$1,842	$1,984
Postage/Shipping	$932	$1,150	$1,254	$1,420	$1,572	$1,693
Publications/Newsletter	$896	$1,105	$1,206	$1,366	$1,511	$1,628
Scholarships	$5,600	$6,907	$7,536	$8,534	$9,444	$10,175
Phone	$1,908	$2,353	$2,567	$2,908	$3,218	$3,467
Total Admin. Expenses	**$48,575**	**$61,[illegible]8**	**$68,581**	**$79,654**	**$90,460**	**$100,107**

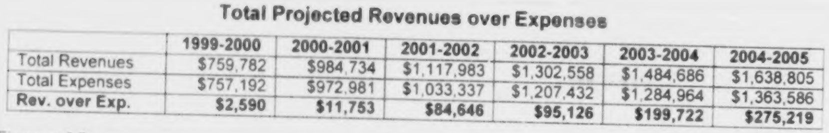
Figure 17



Grand Total Expenses

Category	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
Personnel	$622,941	$746,302	$791,447	$943,654	$1,000,053	$1,059,826
Supplies	$40,586	$50,060	$54,614	$61,854	$68,445	$73,745
Space	$45,090	$115,271	$118,695	$122,270	$126,006	$129,908
Administrative	$48,575	$61,348	$68,581	$79,654	$90,460	$100,107
Grand Total	**$757,192**	**$972,981**	**$1,033,337**	**$1,207,432**	**$1,284,964**	**$1,363,586**

Figure 18.



Total Projected Revenues over Expenses

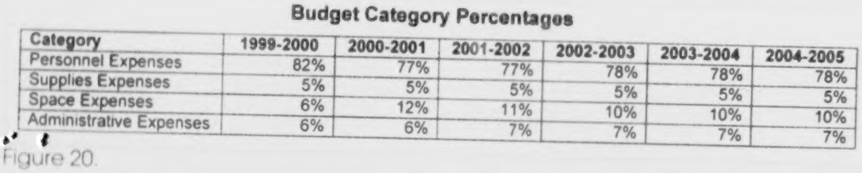
	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
Total Revenues	$759,782	$984,734	$1,117,983	$1,302,558	$1,484,686	$1,638,805
Total Expenses	$757,192	$972,981	$1,033,337	$1,207,432	$1,284,964	$1,363,586
Rev. over Exp.	**$2,590**	**$11,753**	**$84,646**	**$95,126**	**$199,722**	**$275,219**

Figure 19.

The expense summary in Figure 18 can be useful not only as a bird's-eye view of all expenses but also as a way of evaluating whether or not the allocation of funds is well balanced. The spreadsheet in Figure 20 shows the percentage of the total expense budget devoted to each category of expense.

If personnel expenses are more than 70% of the total budget and space is less than 15%, the budget can be considered well rounded in its allocation of funds.

With all of these projections in hand, it is now possible to begin a capital campaign.



Budget Category Percentages

Category	1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
Personnel Expenses	82%	77%	77%	78%	78%	78%
Supplies Expenses	5%	5%	5%	5%	5%	5%
Space Expenses	6%	12%	11%	10%	10%	10%
Administrative Expenses	6%	6%	7%	7%	7%	7%

Figure 20.

Frequently Asked Questions

How do we know when our school is ready to expand, or to begin a Long-Range Plan to expand? When is the financial base of the school secure enough for a major capital drive?

A school is ready to expand when demand exceeds space or when existing space is full. Usually, expansion is driven by parent interest in adding an age level to the school: lower elementary, upper elementary, or adolescent. Since enrollment tends to taper off in the higher age levels, schools usually need to expand lower levels in order to support any planned addition of higher age levels. A usual school configuration includes two or three preschool classes, two or three lower elementary classes, one or two upper elementary classes, one adolescent program, and one or two infant-toddler communities. The head of school must to some degree nurture expansion, but a successful Long-Range Plan is built not just on the board's or head's desires, but on a whole-school consensus.

The feasibility of expansion can often be judged by a capital reserve accumulating due to annual surpluses. This reserve is not used to fund the expansion, but it can be used as "bridge financing" to get the project started before fundraising dollars begin to roll in. The capital reserve for nonprofits recommended by the Price Waterhouse nonprofit division is 25%-30% of the total operational budget–this amount is a good indicator of capacity to expand and to take on additional debt.

See Chapter 15 for information on the Long-Range Plan

Most expansion drives require some mortgage assistance, but at the same time the present families must fundraise effectively and take fiscal responsibility for operations. Expansion funds should not be used to cover operational deficit because once expansion money stops coming in, operations may return to higher deficits even than before. That is why conducting a feasibility study is so important.

When should the school hire a professional funds developer or a director of development?

Especially for a one-time capital drive, a school may choose to hire a reputable funds developer in lieu of a permanent director of development. It is often more desirable to hire a short-term fundraiser who has a high profile and experience in leading benefaction in the community at large. Fundraisers who are alumni of the school are particularly effective. It is important, however, to make sure that the fundraiser's track record justifies his or her cost. Fundraisers typically will do a feasibility study and present a funds development plan that includes their fee, which is either a flat rate or a percentage of funds raised.

Schools with increasing overhead due to facility and program expansion often choose to hire a part-time or full-time director of development to address all levels of fundraising, with a particular focus on community giving from beyond the school: foundation solicitation and follow-up, annual giving approaches to grandparents and families of graduates, private gifts, and corporate partnerships. The director of development will look for different ways to market the school to benefactors relative to innovative and new programs. Usually the development office also addresses public relations, publications, special events, and volunteer management, as well as fundraising (see job description in this chapter's Sample Documents).

Further Reading from NAMTA

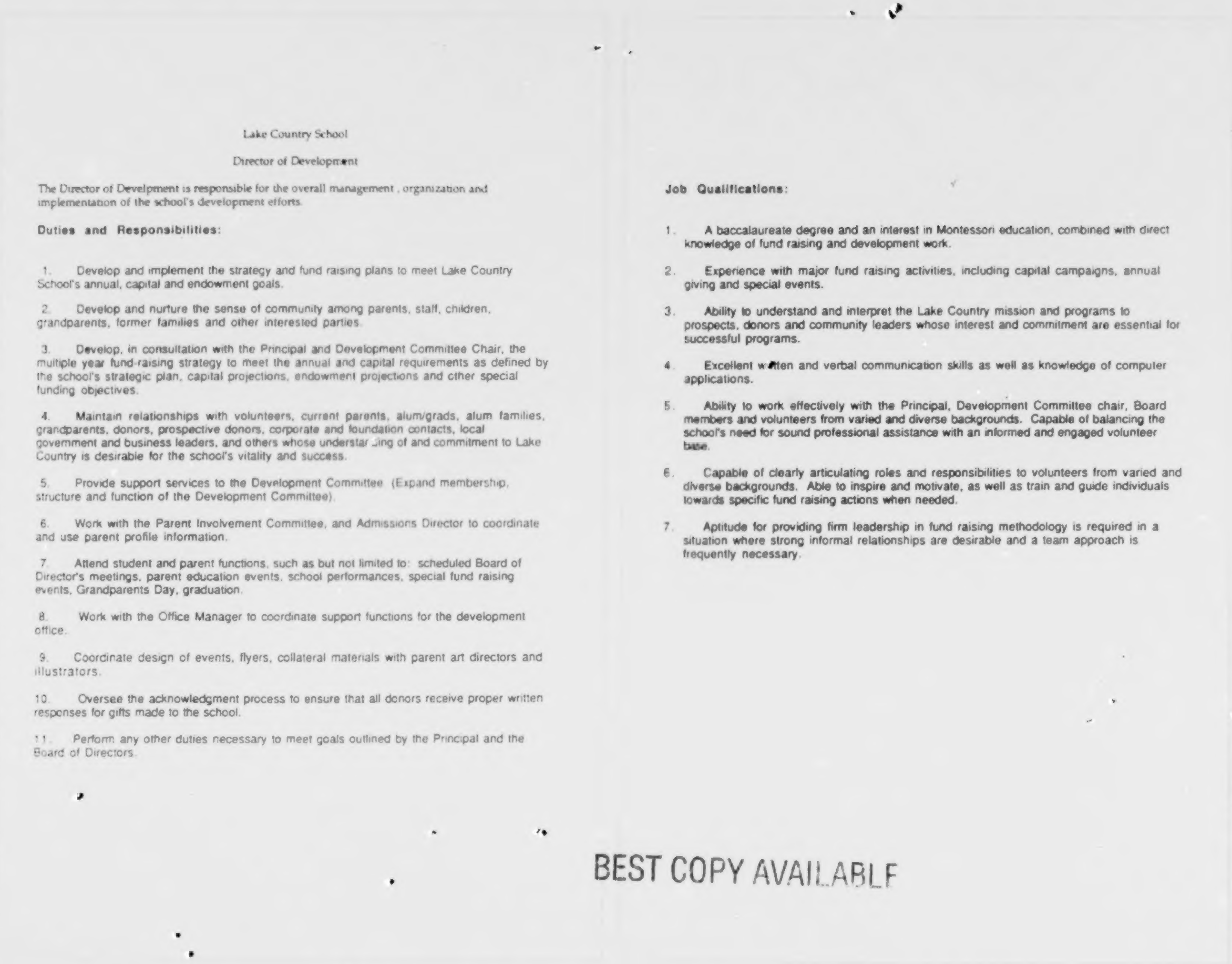
The following articles and documents are available as photocopies from NAMTA. See Appendix 4 for ordering information.

Ackerman, Ron. "Low Cost Expansion." *The NAMTA Quarterly* 6.1 (1980, Fall): 1-4. 3 total pages.

Sample Documents

The following documents illustrate common practices in Montessori school operations. To view documents at full size, photocopy and enlarge.

Director of Development Job Description, Lake Country School (Minneapolis, MN)



Lake Country School

Director of Development

The Director of Develpment is responsible for the overall management, organization and implementation of the school's development efforts.

Duties and Responsibilities:

1. Develop and implement the strategy and fund raising plans to meet Lake Country School's annual, capital and endowment goals.

2. Develop and nurture the sense of community among parents, staff, children, grandparents, former families and other interested parties.

3. Develop, in consultation with the Principal and Development Committee Chair, the multiple year fund-raising strategy to meet the annual and capital requirements as defined by the school's strategic plan, capital projections, endowment projections and other special funding objectives.

4. Maintain relationships with volunteers, current parents, alum/grads, alum families, grandparents, donors, prospective donors, corporate and foundation contacts, local government and business leaders, and others whose understanding of and commitment to Lake Country is desirable for the school's vitality and success.

5. Provide support services to the Development Committee. (Expand membership, structure and function of the Development Committee).

6. Work with the Parent Involvement Committee, and Admissions Director to coordinate and use parent profile information.

7. Attend student and parent functions, such as but not limited to: scheduled Board of Director's meetings, parent education events, school performances, special fund raising events, Grandparents Day, graduation.

8. Work with the Office Manager to coordinate support functions for the development office.

9. Coordinate design of events, flyers, collateral materials with parent art directors and illustrators.

10. Oversee the acknowledgment process to ensure that all donors receive proper written responses for gifts made to the school.

11. Perform any other duties necessary to meet goals outlined by the Principal and the Board of Directors.

Job Qualifications:

1. A baccalaureate degree and an interest in Montessori education, combined with direct knowledge of fund raising and development work.

2. Experience with major fund raising activities, including capital campaigns, annual giving and special events.

3. Ability to understand and interpret the Lake Country mission and programs to prospects, donors and community leaders whose interest and commitment are essential for successful programs.

4. Excellent written and verbal communication skills as well as knowledge of computer applications.

5. Ability to work effectively with the Principal, Development Committee chair, Board members and volunteers from varied and diverse backgrounds. Capable of balancing the school's need for sound professional assistance with an informed and engaged volunteer base.

6. Capable of clearly articulating roles and responsibilities to volunteers from varied and diverse backgrounds. Able to inspire and motivate, as well as train and guide individuals towards specific fund raising actions when needed.

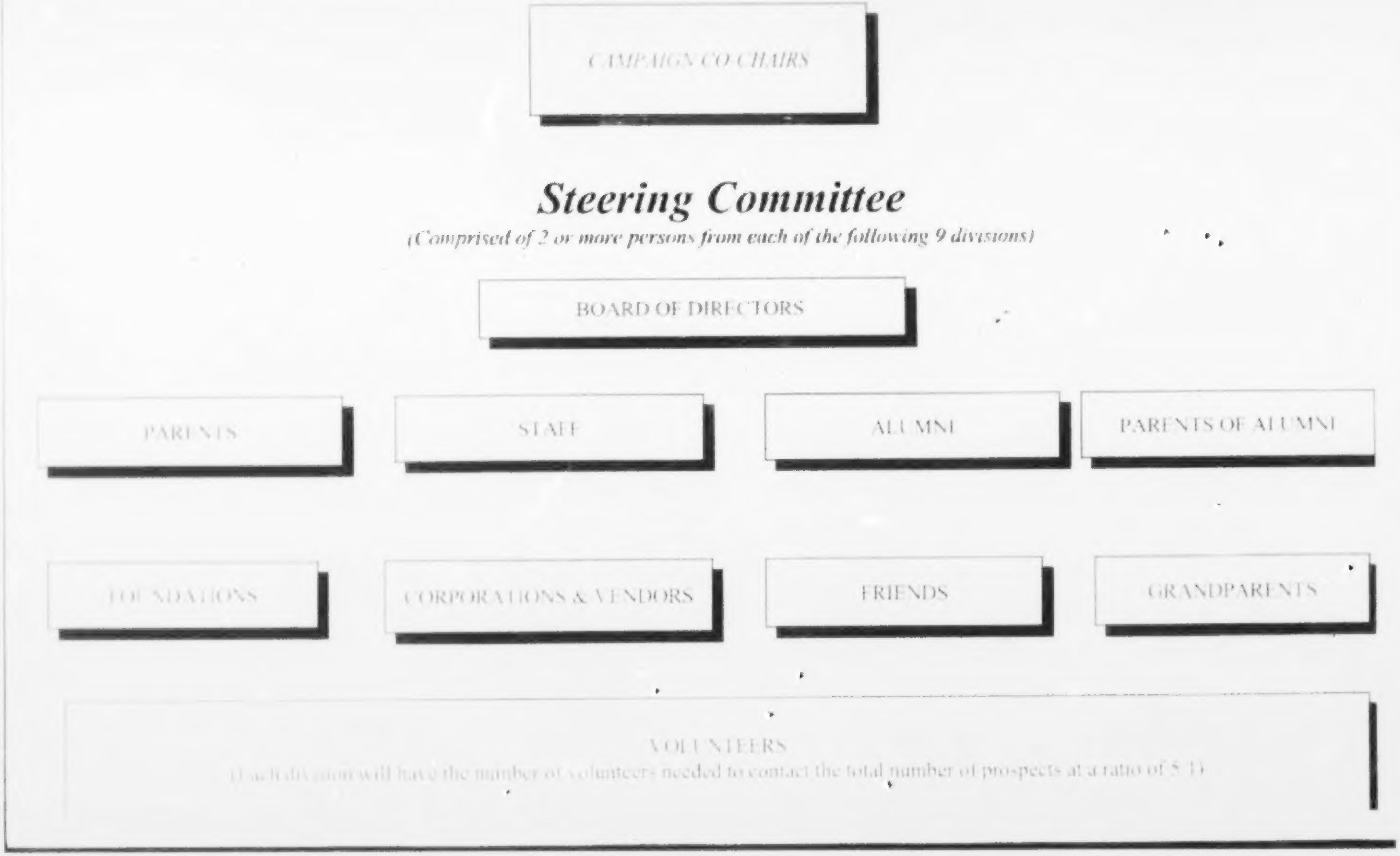
7. Aptitude for providing firm leadership in fund raising methodology is required in a situation where strong informal relationships are desirable and a team approach is frequently necessary.

Large schools with frequent capital needs usually require a Director of Development.

Volunteer Organizational Chart, Milwaukee Montessori School (Milwaukee, WI)

A clear picture of the people structure of the capital campaign.

A Montessori Model for Milwaukee - Campaign For A United Campus
Volunteer Organizational Chart


CAMPAIGN CO-CHAIRS
Steering Committee
(Comprised of 2 or more persons from each of the following 9 divisions)
BOARD OF DIRECTORS
PARENTS
STAFF
ALUMNI
PARENTS OF ALUMNI
FOUNDATIONS
CORPORATIONS & VENDORS
FRIENDS
GRANDPARENTS
VOLUNTEERS
(Each division will have the number of volunteers needed to contact the total number of prospects at a ratio of 5:1)

Campaign Job Descriptions, Milwaukee Montessori School (Milwaukee, WI)

MILWAUKEE MONTESSORI SCHOOL

CAPITAL CAMPAIGN FOR A UNITED CAMPUS

The Role of the Campaign Co-Chairs

Co-Chairs will be well known and respected leaders who are deeply committed to Milwaukee Montessori School and its mission being a "model" Montessori School. They will provide leadership and assist in coordinating activities related to the renovation and expansion campaign. Their selected involvement throughout the process will add momentum and give organization and direction for others to become involved.

Co-Chairs will be asked to provide leadership in the following ways:

1. **ENDORSE** the renovation and expansion campaign and its financial goal. The names of the co-chairs will be listed on appropriate campaign materials and letterhead.
2. **ASSIST** Milwaukee Montessori staff and other volunteers in the enlistment of other selected campaign leadership, including the Campaign Steering Committee.
3. **PRESIDE** at campaign steering committee and other meetings to review campaign strategy and preparations for the formal gift solicitations.
4. At the appropriate time, **MAKE** a financial commitment to the Campaign.
5. **ASSIST** other campaign leaders in the identification, cultivation and solicitation of selected major gift prospects.
6. **ADVISE** the staff on all aspects of the campaign strategy to guarantee its success.

By virtue of their personal and professional stature, the Co-Chairs will enhance the Campaign effort of Milwaukee Montessori School through their association and leadership. Their leadership will highlight the importance of the expansion/renovation program and help to ensure its success.

All day-to-day details including preparations for meetings and events, communications such as letters and memos, proposals and the scheduling of meetings will be coordinated by MMS staff and counsel.

Clearly defines the role of all campaign participants.

Campaign Job Descriptions, Milwaukee Montessori School (continued)

MILWAUKEE MONTESSORI SCHOOL
CAMPAIGN FOR A UNITED CAMPUS

The Role of the Campaign Steering Committee

The Campaign Steering Committee will be made up of parents, alumni and friends of Milwaukee Montessori School who are well known and respected. The Committee members will provide leadership by their example and by their commitment to and appreciation for the excellence of education provided by the School.

Their participation will assist in coordinating the preparation and implementation of all activities related to the campaign. Their selected involvement will give motivation and direction for others to become involved. The Campaign Steering Committee will be asked to provide leadership in the following ways:

1. To **UNDERSTAND** and **ENDORSE** the purpose and mission of Milwaukee Montessori School and to articulate the vision and future plans at selected meetings and gatherings.
2. To **ATTEND** regularly scheduled meetings during the duration of the campaign activity.
3. To **ASSIST** in the **DEVELOPMENT OF STRATEGY** to secure the leadership and major gifts to assure a successful campaign effort.
4. To **MAKE** their own personal and/or corporate **FINANCIAL COMMITMENT** to the campaign when asked to do so.
5. To **ASSIST** in the identification and enlistment of leadership and prospective donors for the Divisional Campaigns.
6. To **PARTNER** with staff or other volunteers in the cultivation and solicitation of gifts to assure successful completion of the campaign goal.

By virtue of their personal and professional stature, Campaign Steering Committee members will enhance this important program for Milwaukee Montessori School through their association and leadership.

All day-to-day organizational and functional details including the preparation of agendas, campaign materials, letters, tracking information and the scheduling of meetings will be coordinated by Staff and Counsel.

MILWAUKEE MONTESSORI SCHOOL
CAPITAL CAMPAIGN FOR A UNITED CAMPUS

The Role of the Campaign Volunteers (All Divisions)

Campaign volunteers will be made up of parents, alumni and friends of Milwaukee Montessori School who are well known, respected and or dedicated to the school and this campaign. They will provide leadership by their example and by their commitment to and appreciation for the excellence of education provided by the School.

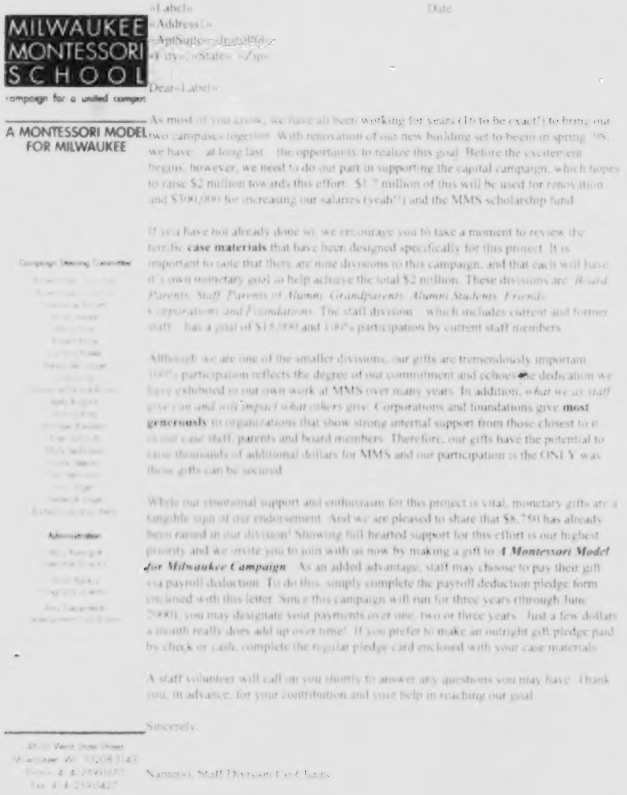
Their participation will assist in coordinating the preparation and solicitation of gifts and pledges from prospects within their division. The Volunteers will be asked to provide leadership in the following ways:

1. To **UNDERSTAND** and **ENDORSE** the purpose and mission of the Milwaukee Montessori School and to articulate the vision and future plans to prospective donors.
2. To **ATTEND** regularly scheduled meetings for orientation, training and reporting of activities and results.
3. To **ASSIST** in the **DEVELOPMENT OF STRATEGY** to effectively secure gifts and pledges from selected prospects.
4. To **MAKE** a personal and/or corporate **FINANCIAL COMMITMENT** to the campaign when asked to do so.
5. To **SOLICIT** individually or with staff or other volunteers 4-5 pre-selected prospects.
6. To **REPORT** results on a regular basis to assure the timely accounting of gifts and pledges secured for the campaign.

By virtue of their personal and professional stature, Campaign Volunteers will enhance this important program for Milwaukee Montessori School through their association and leadership.

Staff Solicitation Letter with Graphics, Milwaukee Montessori School (Milwaukee, WI)

Staff benefit from capital improvements. Why not ask them to contribute?



MILWAUKEE MONTESSORI SCHOOL
campaign for a united campus

A MONTESSORI MODEL FOR MILWAUKEE

«Label»
«Address1»
«AptSuite»«Inst#2»
«City», «State» «Zip»

Date

Dear «Label»

As most of you know, we have all been working for years (16 to be exact!) to bring our two campuses together. With renovation of our new building set to begin in spring '98, we have — at long last — the opportunity to realize this goal. Before the excitement begins, however, we need to do our part in supporting the capital campaign, which hopes to raise $2 million towards this effort. $1.7 million of this will be used for renovation and $300,000 for increasing our salaries (yeah!!) and the MMS scholarship fund.

If you have not already done so, we encourage you to take a moment to review the terrific **case materials** that have been designed specifically for this project. It is important to note that there are nine divisions to this campaign, and that each will have it's own monetary goal to help achieve the total $2 million. These divisions are: *Board, Parents, Staff, Parents of Alumni, Grandparents, Alumni Students, Friends, Corporations and Foundations.* The staff division — which includes current and former staff — has a goal of $15,000 and 100% participation by current staff members.

Although we are one of the smaller divisions, our gifts are tremendously important. 100% participation reflects the degree of our commitment and echoes the dedication we have exhibited in our own work at MMS over many years. In addition, *what we as staff give can and will impact what others give.* Corporations and foundations give **most generously** to organizations that show strong internal support from those closest to it — in our case staff, parents and board members. Therefore, our gifts have the potential to raise thousands of additional dollars for MMS and our participation is the ONLY way these gifts can be secured.

While our emotional support and enthusiasm for this project is vital, monetary gifts are a tangible sign of our endorsement. And we are pleased to share that $8,750 has already been raised in our division! Showing full hearted support for this effort is our highest priority and we invite you to join with us now by making a gift to ***A Montessori Model for Milwaukee Campaign***. As an added advantage, staff may choose to pay their gift via payroll deduction. To do this, simply complete the payroll deduction pledge form enclosed with this letter. Since this campaign will run for three years (through June 2000), you may designate your payments over one, two or three years. Just a few dollars a month really does add up over time! If you prefer to make an outright gift/pledge paid by check or cash, complete the regular pledge card enclosed with your case materials.

A staff volunteer will call on you shortly to answer any questions you may have. Thank you, in advance, for your contribution and your help in reaching our goal.

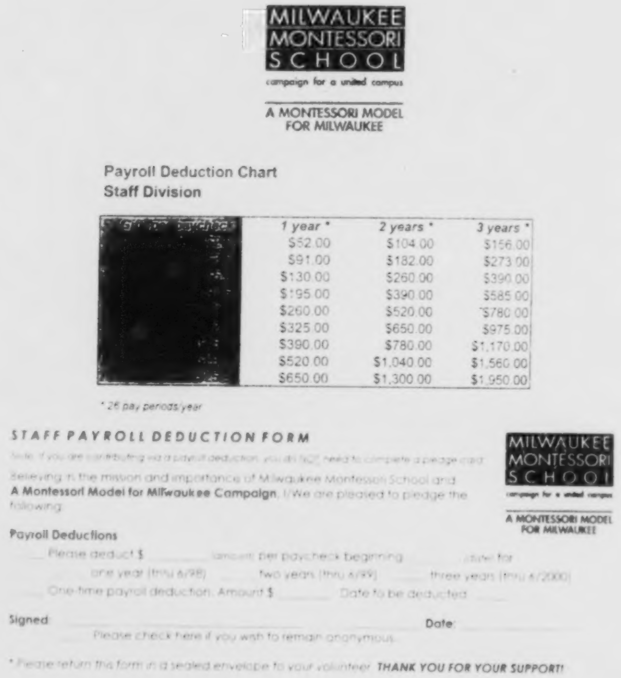
Sincerely,

Name(s), Staff Division Co-Chairs

Campaign Steering Committee

Administration

[illegible] West State Street
Milwaukee, WI 53208-3143
Phone 414-259[illegible]
Fax 414-2590427



MILWAUKEE MONTESSORI SCHOOL
campaign for a united campus

A MONTESSORI MODEL FOR MILWAUKEE

Payroll Deduction Chart
Staff Division

[illegible]	*1 year **	*2 years **	*3 years **
[illegible]	$52.00	$104.00	$156.00
[illegible]	$91.00	$182.00	$273.00
[illegible]	$130.00	$260.00	$390.00
[illegible]	$195.00	$390.00	$585.00
[illegible]	$260.00	$520.00	$780.00
[illegible]	$325.00	$650.00	$975.00
[illegible]	$390.00	$780.00	$1,170.00
[illegible]	$520.00	$1,040.00	$1,560.00
[illegible]	$650.00	$1,300.00	$1,950.00

** 26 pay periods/year*

STAFF PAYROLL DEDUCTION FORM

MILWAUKEE MONTESSORI SCHOOL
campaign for a united campus

A MONTESSORI MODEL FOR MILWAUKEE

Note: If you are contributing via a payroll deduction, you do NOT need to complete a pledge card.

Believing in the mission and importance of Milwaukee Montessori School and **A Montessori Model for Milwaukee Campaign**, I/We are pleased to pledge the following:

Payroll Deductions

___ Please deduct $ ________ (amount) per paycheck beginning ________ (date) for
___ one year (thru 6/98) ___ two years (thru 6/99) ___ three years (thru 6/2000)
___ One-time payroll deduction. Amount $ ______ Date to be deducted ____

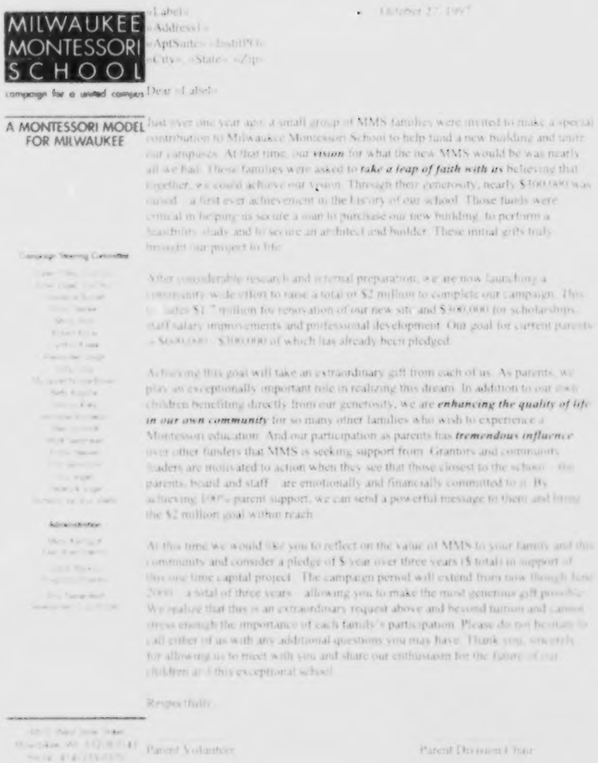
Signed: ______________________ **Date:** ____________
___ Please check here if you wish to remain anonymous.

** Please return this form in a sealed envelope to your volunteer.* ***THANK YOU FOR YOUR SUPPORT!***

C32

C33

One letter targets parents who have made a previous gift, while a different letter is sent to those who have not yet contributed



MILWAUKEE MONTESSORI SCHOOL
campaign for a united campus

A MONTESSORI MODEL FOR MILWAUKEE

«Label»
«Address1»
«AptSuite»«InstitPO»
«City», «State» «Zip»

October 27, 1997

Dear «Label»

Just over one year ago, a small group of MMS families were invited to make a special contribution to Milwaukee Montessori School to help fund a new building and unite our campuses. At that time, our ***vision*** for what the new MMS would be was nearly all we had. These families were asked to ***take a leap of faith with us*** believing that together, we could achieve our vision. Through their generosity, nearly $300,000 was raised — a first ever achievement in the history of our school. Those funds were critical in helping us secure a loan to purchase our new building, to perform a feasibility study and to secure an architect and builder. These initial gifts truly brought our project to life.

After considerable research and internal preparation, we are now launching a community-wide effort to raise a total of $2 million to complete our campaign. This includes $1.7 million for renovation of our new site and $300,000 for scholarships, staff salary improvements and professional development. Our goal for current parents is $600,000 - $300,000 of which has already been pledged.

Achieving this goal will take an extraordinary gift from each of us. As parents, we play an exceptionally important role in realizing this dream. In addition to our own children benefiting directly from our generosity, we are ***enhancing the quality of life in our own community*** for so many other families who wish to experience a Montessori education. And our participation as parents has ***tremendous influence*** over other funders that MMS is seeking support from. Grantors and community leaders are motivated to action when they see that those closest to the school — the parents, board and staff — are emotionally and financially committed to it. By achieving 100% parent support, we can send a powerful message to them and bring the $2 million goal within reach.

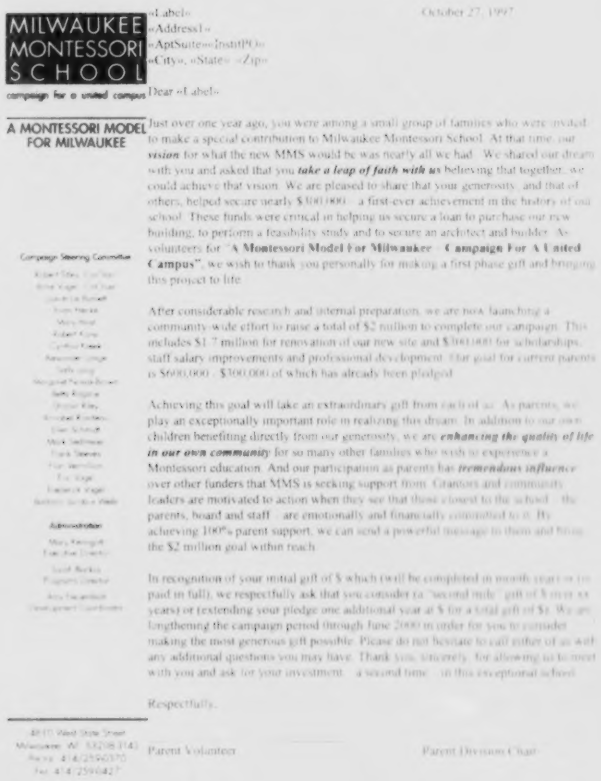
At this time we would like you to reflect on the value of MMS to your family and this community and consider a pledge of $ year over three years ($ total) in support of this one time capital project. The campaign period will extend from now though June 2000 — a total of three years — allowing you to make the most generous gift possible. We realize that this is an extraordinary request above and beyond tuition and cannot stress enough the importance of each family's participation. Please do not hesitate to call either of us with any additional questions you may have. Thank you, sincerely, for allowing us to meet with you and share our enthusiasm for the future of our children and this exceptional school.

Respectfully,

Parent Volunteer

Parent Division Chair

Parent Solicitation Letters, Milwaukee Montessori School (Milwaukee, WI)



MILWAUKEE MONTESSORI SCHOOL
campaign for a united campus

A MONTESSORI MODEL FOR MILWAUKEE

«Label»
«Address1»
«AptSuite»«InstitPO»
«City», «State» «Zip»

October 27, 1997

Dear «Label»

Just over one year ago, you were among a small group of families who were invited to make a special contribution to Milwaukee Montessori School. At that time, our ***vision*** for what the new MMS would be was nearly all we had. We shared our dream with you and asked that you ***take a leap of faith with us*** believing that together, we could achieve that vision. We are pleased to share that your generosity, and that of others, helped secure nearly $300,000 — a first-ever achievement in the history of our school. These funds were critical in helping us secure a loan to purchase our new building, to perform a feasibility study and to secure an architect and builder. As volunteers for **"A Montessori Model For Milwaukee – Campaign For A United Campus"**, we wish to thank you personally for making a first phase gift and bringing this project to life.

After considerable research and internal preparation, we are now launching a community-wide effort to raise a total of $2 million to complete our campaign. This includes $1.7 million for renovation of our new site and $300,000 for scholarships, staff salary improvements and professional development. Our goal for current parents is $600,000 - $300,000 of which has already been pledged.

Achieving this goal will take an extraordinary gift from each of us. As parents, we play an exceptionally important role in realizing this dream. In addition to our own children benefiting directly from our generosity, we are ***enhancing the quality of life in our own community*** for so many other families who wish to experience a Montessori education. And our participation as parents has ***tremendous influence*** over other funders that MMS is seeking support from. Grantors and community leaders are motivated to action when they see that those closest to the school — the parents, board and staff — are emotionally and financially committed to it. By achieving 100% parent support, we can send a powerful message to them and bring the $2 million goal within reach.

In recognition of your initial gift of $ which (will be completed in month year) or (is paid in full), we respectfully ask that you consider (a "second mile" gift of $ over xx years) or (extending your pledge one additional year at $ for a total gift of $). We are lengthening the campaign period through June 2000 in order for you to consider making the most generous gift possible. Please do not hesitate to call either of us with any additional questions you may have. Thank you, sincerely, for allowing us to meet with you and ask for your investment — a second time — in this exceptional school.

Respectfully,

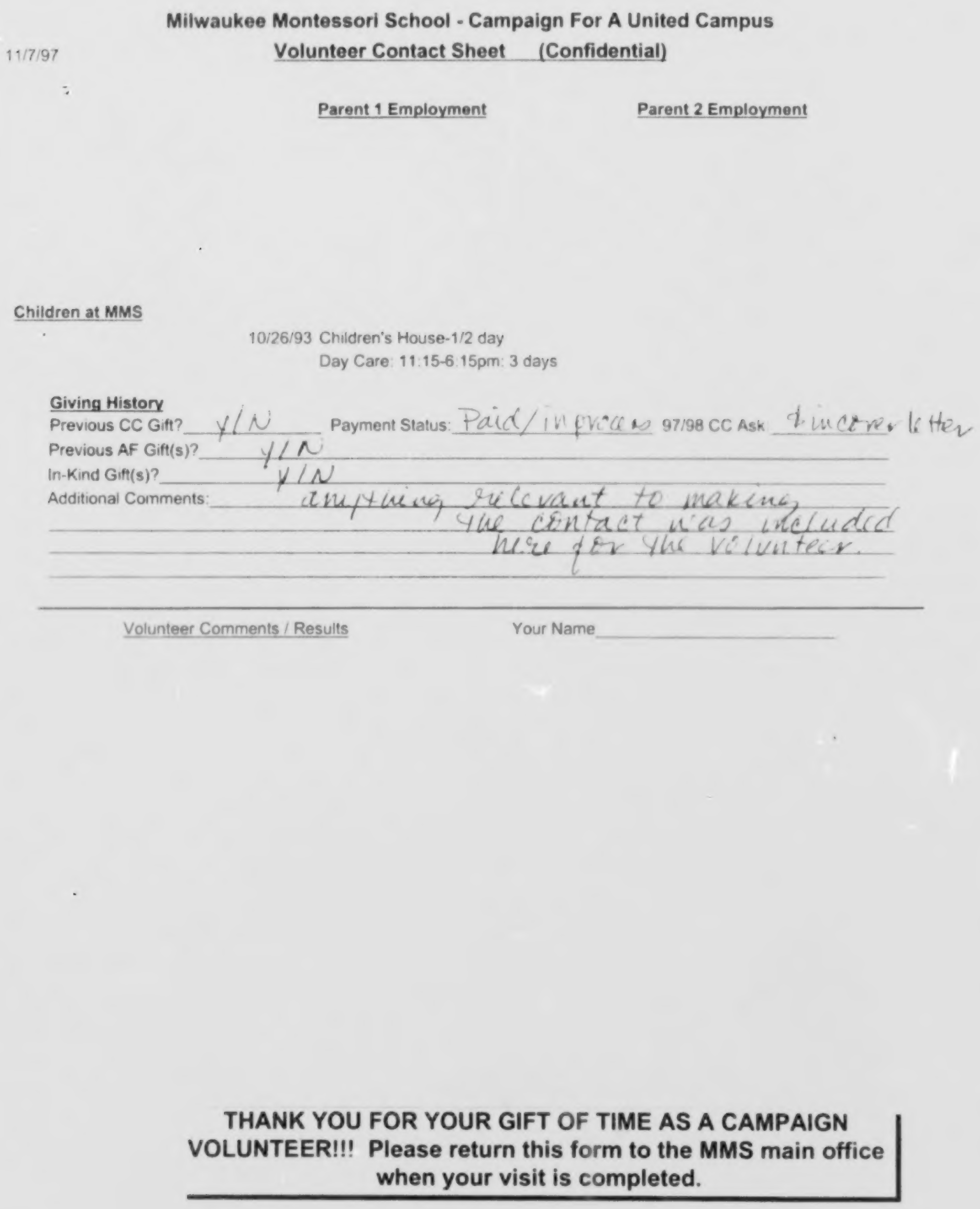
Parent Volunteer

Parent Division Chair

[illegible] West State Street
Milwaukee, WI 53208-3143
Phone 414/2590370
Fax 414/2590427

BEST COPY AVAILABLE

Volunteer Contact Sheet, Milwaukee Montessori School (Milwaukee, WI)



Milwaukee Montessori School - Campaign For A United Campus

11/7/97

Volunteer Contact Sheet (Confidential)

Parent 1 Employment **Parent 2 Employment**

Children at MMS

10/26/93 Children's House-1/2 day
Day Care: 11:15-6:15pm: 3 days

Giving History

Previous CC Gift? Y/N Payment Status: Paid/in process 97/98 CC Ask $ in cover letter

Previous AF Gift(s)? Y/N

In-Kind Gift(s)? Y/N

Additional Comments: anything relevant to making the contact was included here for the volunteer.

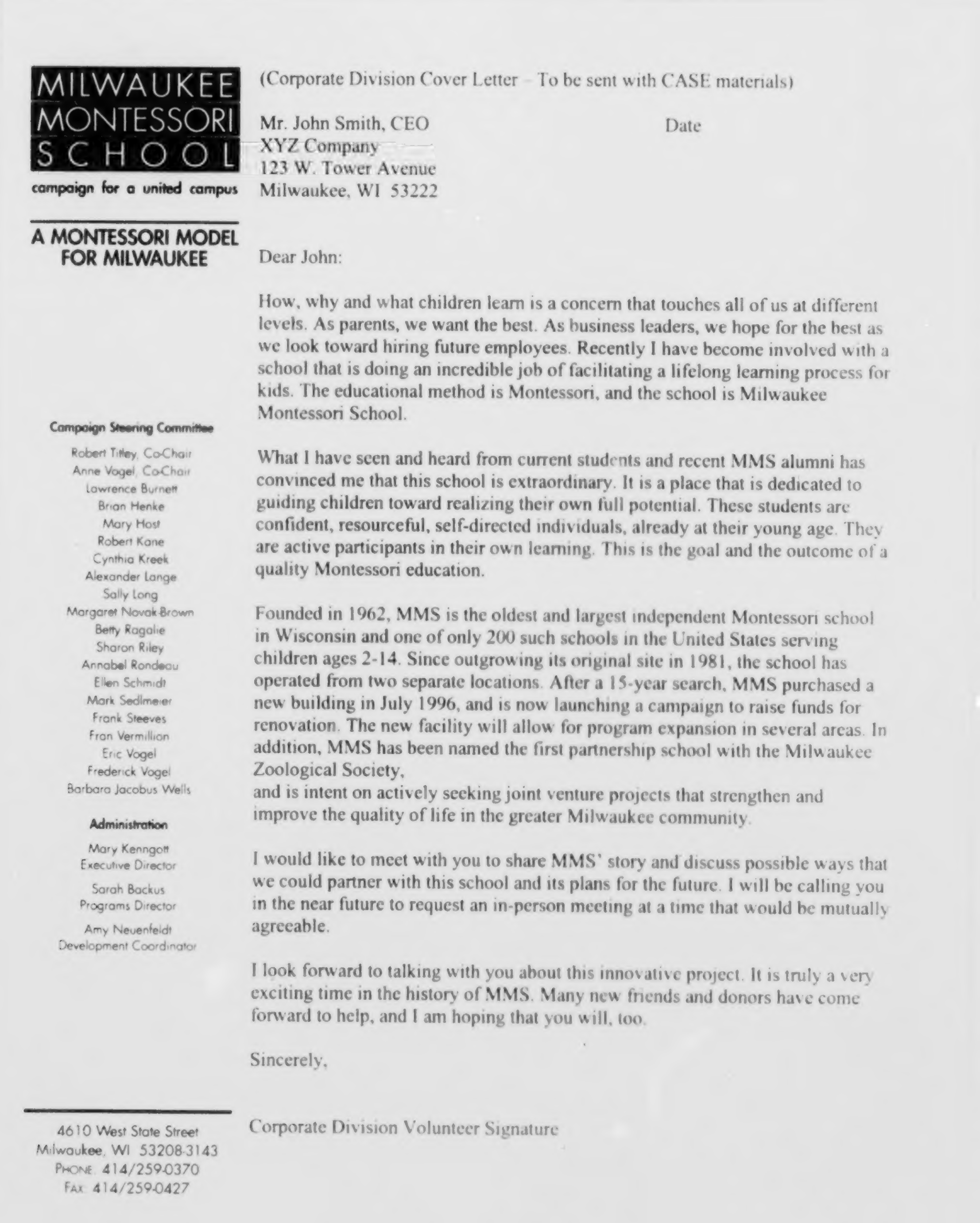
Volunteer Comments / Results Your Name

THANK YOU FOR YOUR GIFT OF TIME AS A CAMPAIGN VOLUNTEER!!! Please return this form to the MMS main office when your visit is completed.

A personalized contact sheet for volunteers to document their conversations with each parent prospect.

636

Corporate Solicitation Letter, Milwaukee Montessori School (Milwaukee, WI)



MILWAUKEE
MONTESSORI
SCHOOL
campaign for a united campus

A MONTESSORI MODEL FOR MILWAUKEE

(Corporate Division Cover Letter – To be sent with CASE materials)

Mr. John Smith, CEO
XYZ Company
123 W. Tower Avenue
Milwaukee, WI 53222

Date

Dear John:

How, why and what children learn is a concern that touches all of us at different levels. As parents, we want the best. As business leaders, we hope for the best as we look toward hiring future employees. Recently I have become involved with a school that is doing an incredible job of facilitating a lifelong learning process for kids. The educational method is Montessori, and the school is Milwaukee Montessori School.

What I have seen and heard from current students and recent MMS alumni has convinced me that this school is extraordinary. It is a place that is dedicated to guiding children toward realizing their own full potential. These students are confident, resourceful, self-directed individuals, already at their young age. They are active participants in their own learning. This is the goal and the outcome of a quality Montessori education.

Founded in 1962, MMS is the oldest and largest independent Montessori school in Wisconsin and one of only 200 such schools in the United States serving children ages 2-14. Since outgrowing its original site in 1981, the school has operated from two separate locations. After a 15-year search, MMS purchased a new building in July 1996, and is now launching a campaign to raise funds for renovation. The new facility will allow for program expansion in several areas. In addition, MMS has been named the first partnership school with the Milwaukee Zoological Society,
and is intent on actively seeking joint venture projects that strengthen and improve the quality of life in the greater Milwaukee community.

I would like to meet with you to share MMS' story and discuss possible ways that we could partner with this school and its plans for the future. I will be calling you in the near future to request an in-person meeting at a time that would be mutually agreeable.

I look forward to talking with you about this innovative project. It is truly a very exciting time in the history of MMS. Many new friends and donors have come forward to help, and I am hoping that you will, too.

Sincerely,

Corporate Division Volunteer Signature

Campaign Steering Committee
Robert Tifley, Co-Chair
Anne Vogel, Co-Chair
Lawrence Burnett
Brian Henke
Mary Host
Robert Kane
Cynthia Kreek
Alexander Lange
Sally Long
Margaret Novak-Brown
Betty Ragalie
Sharon Riley
Annabel Rondeau
Ellen Schmidt
Mark Sedlmeier
Frank Steeves
Fran Vermillion
Eric Vogel
Frederick Vogel
Barbara Jacobus Wells

Administration
Mary Kenngott
Executive Director

Sarah Backus
Programs Director

Amy Neuenfeldt
Development Coordinator

4610 West State Street
Milwaukee, WI 53208-3143
PHONE 414/259-0370
FAX 414/259-0427

Solicitation of a corporate gift requires a unique approach.

Letter of Intent, Milwaukee Montessori School (Milwaukee, WI)

This brief project description can be used as a general cover letter for foundation requests or as a handout on the project.

MILWAUKEE MONTESSORI SCHOOL
A Montessori Model for Milwaukee — Campaign for a United Campus
LETTER OF INTENT

The Organization, Mission & Method

Founded in 1962, Milwaukee Montessori School (MMS) is the oldest and largest independent Montessori school in Wisconsin and the only one of its kind offering comprehensive, year-round programming for children ages 2-grade 8. MMS is governed by a nine-member board of directors, all of whom are parents of current students. The school's mission is to foster the natural desire for lifelong learning and internal happiness in children through the union of Montessori principles and family involvement, within the context of a global community. MMS is a 501c3 non-profit organization.

The Montessori method of education, developed by Dr. Maria Montessori, is unique in many ways. Through her own work, Dr. Montessori pioneered the concept that each person is born with the intuitive ability to seek out and learn what he or she needs to know in order to develop fully. The role of the educator is to provide the ideal or "prepared" environment in which this natural work can occur. In this way, the classroom itself becomes an active and integral participant in the learning process. Specially designed, sensorial materials developed by Dr. Montessori are a predominant feature of the Montessori classroom. Children are encouraged to choose from materials they have received lessons on and to continue their work independently or with other classmates. This process allows children to take ownership and eliminates unnecessary dependence on the adult(s).

Montessori students are empowered to take responsibility for their decisions and actions from a very young age. Decision making skills are fully developed and the resulting self-confidence allows them to make choices that have a direct and lasting impact on their own quality of life. A strong emphasis on cooperation, personal respect and empathy for others underlies a shared commitment that Montessori students will give back to their communities and enhance the lives of others.

To ensure the integrity of her method, Dr. Montessori founded the Association Montessori Internationale (AMI), which oversees certification programs for Montessori teachers and schools. MMS programs are based on these AMI standards and all Montessori staff are AMI-certified. In addition to core academic subjects, the MMS curriculum includes foreign language, technology, music, fine and performing arts, physical education and community-service work. MMS child-care program is based on National Association for the Education of Young Children (NAEYC) curriculum standards and supports the Montessori philosophy of respect for the child. Lead child-care teachers hold degrees in early childhood growth and development.

Programs & Populations Served

MMS currently serves 230 students from two metro-Milwaukee locations. The original campus at 4610 W. State St. now serves ages 2-6 and houses the school's administrative offices. Ages 6-14 are served from rented space in the School Sisters of St. Francis complex at 1501 S. Layton Blvd. Both campuses are open from 6:45 a.m. to 6:15 p.m. daily. Full-day child care is available when school is not in session (i.e. winter and spring vacations, conference days, etc.). During the summer, MMS operates a summer camp, which is open to any child in the community regardless of whether they attend MMS during the school year. MMS operates on a 175-day instructional calendar.

Over one half of MMS students live in Milwaukee and 27% come from multi-ethnic backgrounds. MMS participates in the Choice and PAVE scholarship programs. Additional funds are granted through the school's own scholarship program. In all, 10% of MMS families receive some form of tuition assistance. Tuition ranges from $3,200 for ages 3-4 (1/2 day, 8-11:15 a.m.) to $4,000 for ages 5-14 (full day, 8 a.m.-2:45 p.m.). MMS' operating budget for FY 1997-'98 is $1.3 million. The school employs 35 staff in two locations (27 full-time, 8 part-time) and benefits from a large volunteer base (over 100 annually).

The Challenge

Growing enrollment and new program demands forced MMS to split into two campuses in 1981. The school has operated in two sites since then and cannot expand at either location. MMS receives over 600 requests annually for program information and turns many children (including Choice applicants) away due to lack of space. Attrition between campuses is high because parents do not see the school functioning as a single continuous unit on a daily basis. Interaction across age groups – a strong Montessori element – is nearly impossible. Duplication of effort, equipment and resources required by two sites is costly. The aging State St. campus is operating with an undersized gym, playground and a parking lot built for 45 cars that now serves 100+.

The Project

After a fifteen-year search, MMS purchased a new building at 345 N. 95th St. in Milwaukee (the former St. Therese School) in July 1996. The purchase price of $1.675 million was funded via a conventional loan, $300,000 raised in advance gifts and the school's own funds. The building's previous owners — Milwaukee Engineering Center/Graef, Anhalt, Schloemer & Associates — are now renting the facility from MMS until their new site is ready to occupy in early 1998. MMS will begin remodeling in spring 1998 and relocate in August for the opening of the 1998-'99 school year. The five-acre site includes a 58,000-square-foot building, 2.5 acres of green space, and parking for 100+ cars. This new, united campus will achieve the following goals for MMS:

- Increase enrollment from 230 to 340+ students by the year 2001
- Improve retention of all students through grade 8
- Expand programming to serve ages 18 months to two years, and open the first special-needs Montessori classroom in Milwaukee
- Increase its participation in the Choice and PAVE scholarship programs
- Offer after-school child care to children age 3-14 who attend schools other than MMS, but who do not have on-site child care available at those schools
- Expand the foreign language program and after-school activities in sports, music, theater, arts, community service and environmental studies
- Broaden MMS' reach in the community through partnerships with the Zoological Society of Milwaukee, Hunger Task Force and other local organizations/non-profits with similar philosophies/goals
- Develop no/low-cost parenting and education programs for the community at large
- Serve as a model for other schools (public and independent, Montessori or not) and promote awareness of Montessori educational practices and concepts that are applicable to many school settings
- Be viewed as a leader in the Milwaukee educational community by promoting inter-school communication and joint program development, sponsorship of seminars, hosting of events and meeting spaces for other groups
- Strengthen staff salaries and scholarship funds
- Reduce operating expenses, and duplication of effort and equipment

MMS has engaged the services of Robert Mangurian and Mary-Ann Ray of Studio Works Architects, and Peter Schwabe Builders as its design/build team for renovation of the building and site. A working budget of $1.7 million includes all interior and exterior work to be performed. In addition, MMS desires to raise $300,000 for teacher salaries, program and scholarship enhancements, bringing the total campaign goal to $2 million. A successful feasibility study was completed in January 1997 by Schmeling & Thurmer Associates of Milwaukee.

The Request

The major-gift phase of a capital campaign is now underway and $$$ has been pledged thus far towards our $2 million goal. On behalf of the school's board of directors, we respectfully request (an invitation to submit a complete proposal to *XYZ Foundation)* OR (that the XYZ Foundation consider a gift in the range of $$$ in support of this valuable community asset).

Contact: **Mary Kenngott, executive director**
Milwaukee Montessori School
4610 W. State Street, Milwaukee, WI 53208
Ph: 259-0370 (ext. 23), Fax: 259-0427, Email: mkenngott@execpc.com

BEST COPY AVAILABLE

Scale of Gifts, Milwaukee Montessori School (Milwaukee, WI)

MILWAUKEE
MONTESSORI
SCHOOL
campaign for a united campus

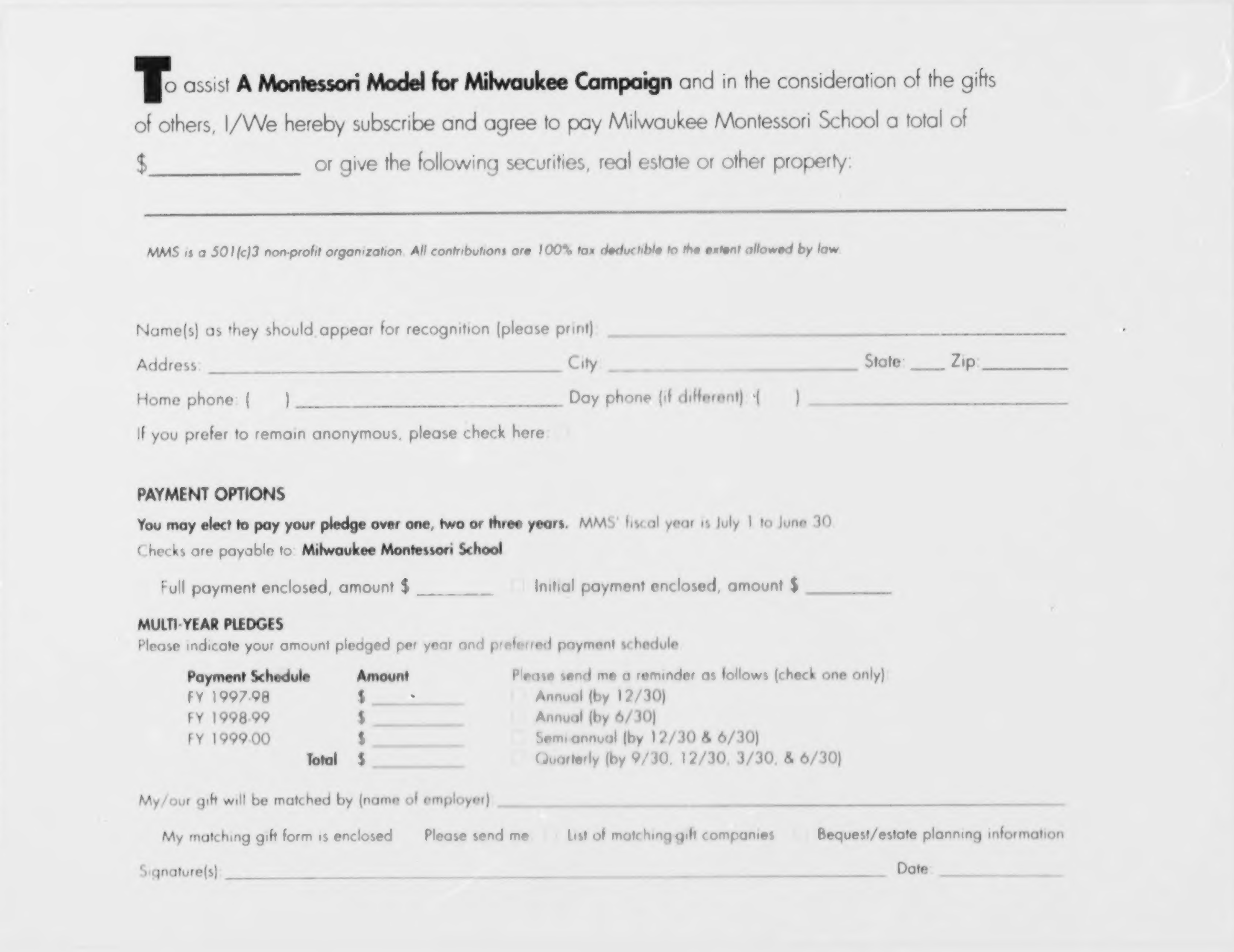
**A MONTESSORI MODEL
FOR MILWAUKEE**

Scale of Gifts

NUMBER OF GIFTS	RANGE	TOTAL
1	400,000	400,000
1	250,000	250,000
1	150,000	150,000
1-3	100,000	200,000
1	75,000	75,000
3	50,000	150,000
6	25,000	150,000
8	15,000	120,000
10	10,000	100,000
15	5,000	75,000
20	3,000	60,000
30	2,000	60,000
50	1,000	50,000
Many	1,000 and below	60,000
	TOTAL	**$2 million**

Gift targets can be established by using a scale of gifts. Many schools will assign specific families to specific sizes of gifts. Solicitations are done with several families at one time, with the head of school, board chair, treasurer, and campaign chairperson all present. Pledge cards can be handed out with recommended amounts based on the scale of gifts.

Pledge Card, Milwaukee Montessori School (Milwaukee, WI)



To assist **A Montessori Model for Milwaukee Campaign** and in the consideration of the gifts of others, I/We hereby subscribe and agree to pay Milwaukee Montessori School a total of $__________ or give the following securities, real estate or other property:

____

MMS is a 501(c)3 non-profit organization. All contributions are 100% tax deductible to the extent allowed by law.

Name(s) as they should appear for recognition (please print): ____________________

Address: ____________________ City: ________________ State: ____ Zip: ________

Home phone: ( ) ________________ Day phone (if different): ( ) ________________

If you prefer to remain anonymous, please check here: ☐

PAYMENT OPTIONS

You may elect to pay your pledge over one, two or three years. MMS' fiscal year is July 1 to June 30.

Checks are payable to: **Milwaukee Montessori School**

☐ Full payment enclosed, amount $ ________ ☐ Initial payment enclosed, amount $ ________

MULTI-YEAR PLEDGES

Please indicate your amount pledged per year and preferred payment schedule.

Payment Schedule	**Amount**	Please send me a reminder as follows (check one only):
FY 1997-98	$ ________	☐ Annual (by 12/30)
FY 1998-99	$ ________	☐ Annual (by 6/30)
FY 1999-00	$ ________	☐ Semi-annual (by 12/30 & 6/30)
Total	$ ________	☐ Quarterly (by 9/30, 12/30, 3/30, & 6/30)

My/our gift will be matched by (name of employer): ____________________

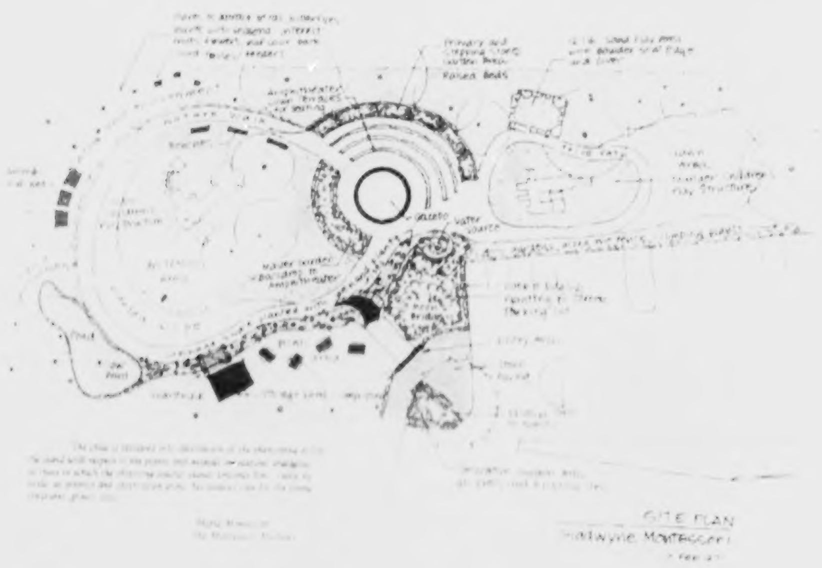
☐ My matching gift form is enclosed Please send me: ☐ List of matching gift companies ☐ Bequest/estate planning information

Signature(s): ______________________________ Date: __________

This card states the campaign in a dignified way as well as offering payment options.

Campaign Brochure, Gladwyne Montessori School (Gladwyne, PA)

The Gladwyne Montessori Outdoor Environment Project



The Gladwyne Montessori School
1997 Outdoor Environment Project

Playground Equipment and Structures to be Installed in the Summer of 1997

Playstructures (appropriate for 2 - 3 year olds)	$ 7 000
(appropriate for 3 - 12 year olds)	$ 30 000
Opened sided Gazebo with stage platform	$ 6 000
Sandbox	$ 2 000
Wood Carpet (pulverized wood mulch for impact protection under all structures to prevent injuries)	$ 9 000
Preparation of ground area (to make a foundation for structures)	$ 4 000
Total	$ 58 000

Additional Work To Be Completed

Purchasing 7 picnic tables	$ 4 000
Fencing (perimeter and interior)	$ 15 200
Parking (create additional parking spaces and turn some existing impermeable surfaces to permeable to meet Lower Merion Township regulations)	$ 15 000
Landscaping (some work will be phased in over five years)	$ 57 800

- Creating a pond for land lab classes
- Building a catchment basin to capture water runoff after rain storms
- Grading of property
- Purchasing of trees and vegetation
- Establishing a series of gardens for educational and aesthetic purposes that relate to all the various ages of our students
- Creating animal habitats
- Building an ampitheatre for gathering meetings and seating for plays and graduation

Total Cost of Project		$150 000
Raised Previously By A PTA Fundraiser	(minus)	$ 23 000
Amount To Be Raised To Complete Project		$127 000

Last year The Board of Trustees undertook a capital campaign, Foresight '96, which to date has raised $289,848, contributed by parents and other members of our school community. With these funds, we renovated and reorganized the interior of our school building in the Summer of 1996. At this time the Board has set its sights on improving the remaining aspects of the school, initially concentrating on our exterior property. Won't you join us and so many other families, by contributing to this worthwhile project which will benefit and enhance the lives of our children, their teachers and you as parents. Thank you so much for your generosity.

Cynthia C. Savett
President, Board of Trustees

This simple project brochure shows the schematic design of the capital project and a financial projection, along with a list of all committee members.

Campaign Brochure, Gladwyne Montessori School (continued)

The intention of the Outdoor Environment Project is to elevate the outdoor-based physical and environmental program to the high standard of our indoor curriculum. Our school is situated on two acres. While part of it is devoted to the driveway and parking, a vast majority of space will be designated for large and small play structures, equipment and a significant amount will be set aside for a land lab.

Our children will be provided with updated, enjoyable, physically rewarding playground equipment that will support their gross motor skills, foster creativity and cooperation, provide physical challenges without safety hazards and provide opportunities for social interaction.

The selection of the equipment will be based on age appropriateness for our children and published safety standards. The new layout will provide areas for large group play, active play, solitary play, quiet play and dramatic play.

With a prepared outdoor environment, education becomes a process not a haphazard event. Trees and vegetation will provide shade, color, fragrance, texture and enclosures. Garden settings will provide areas for observation, study, experimentation, exploration and hands-on experience. Animal habitats can be encouraged into our play area and studied by proper selection of vegetation, trees and shrubs. In addition, the creation of a pond will allow the study and observation of aquatic life. Amphibians, reptiles, caterpillars, butterflies, lady bugs, snails, and birds could be a part of our children's outdoor experience.

The new environment will provide numerous settings, apart from the playstructures and gardens. A sand area will give the children a place to dig, build and explore. Picnic tables will provide a meeting place for lunch and discussions. Storage sheds will house play equipment, garden tools and stage props. The gazebo and amphitheatre will enable the children and teachers to hold presentations, performances and enjoy creative play.

The proceeds from the 1997 Spring Auction, April 12th, 7:00 pm to 12:00 pm, will go directly to the Outdoor Environment Project. Come and spend an enjoyable evening at this kick off event.

Development Committee
Charles T. Wilmerding
Susan C. Rubenstein
William Daniels
Shelly Fisher
Kevin Kinsley
Brian McAdams
Georgiana Null
Valerie Odell
Cynthia C. Sevett
Annemarie B. Torres
Parking Committee
Peggy Castello
[illegible]
Maggie Brown Dougherty
Geraldine Harnett
Ann Lange
[illegible]
Sally Rothschild
Cynthia C. Sevett
Mark K. Thomas
Annemarie B. Torres
Ann L. Wilkes
Playground Committee
Ann C. Snyder
[illegible]
Barbara Barnhart
Maggie Brown Dougherty
[illegible]
[illegible]
[illegible]
[illegible]
[illegible]
Nancy Nall
[illegible]
[illegible]
Annemarie B. Torres
Ann L. Wilkes
PTA
Sally Rothschild, Pres.
Anne Wilmerding, V.P.
[illegible], Secy.
[illegible], Treas.

Auction Committee
Peggy Castello
[illegible]
[illegible]
[illegible]
[illegible]
[illegible]
[illegible]
[illegible]
Michelle Cooper
[illegible]
Mary Dolby
Betsy Donahue
[illegible]
[illegible]
[illegible]
[illegible]
Angela [illegible]
[illegible]
[illegible]
Pat Maguire
[illegible]
[illegible]
[illegible]
[illegible]
[illegible]
Sally Rothschild
Mary Ryan
[illegible]
[illegible]
[illegible]
Ann C. Snyder
[illegible]
[illegible]
[illegible]
[illegible]
[illegible]
[illegible]
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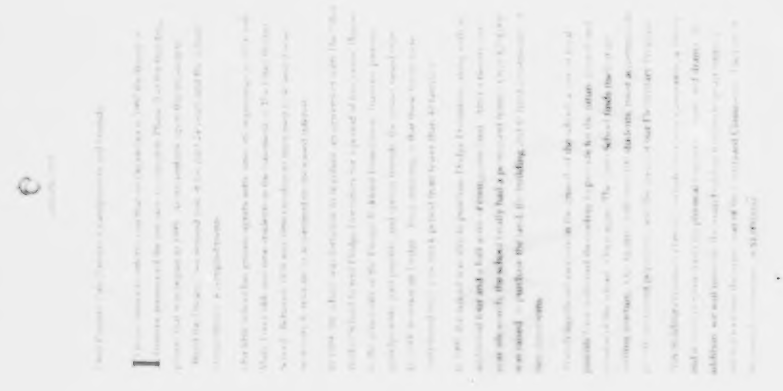
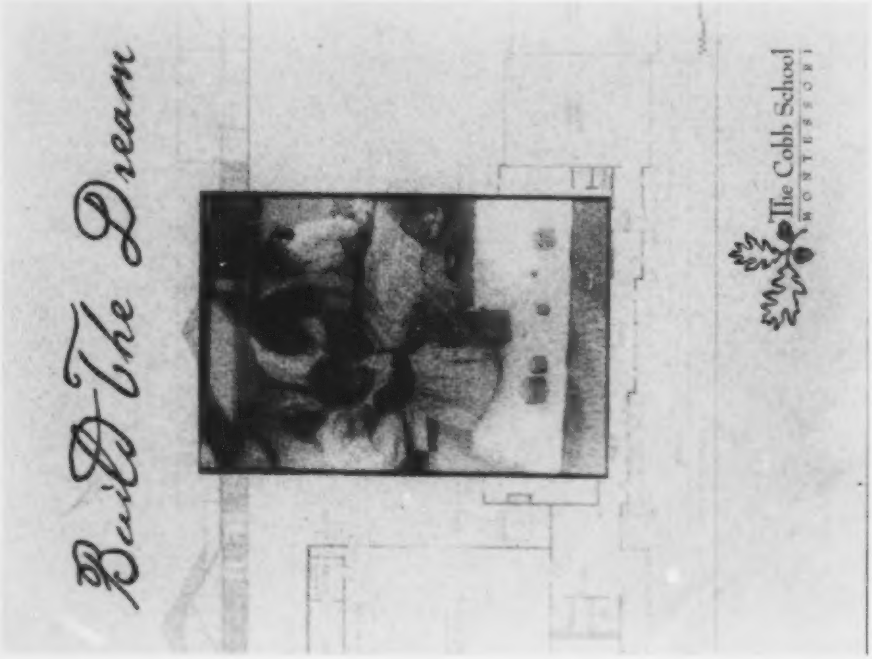
[illegible]
[illegible]
[illegible]

Board of Trustees
Cynthia C. Sevett, Pres.
[illegible], V.P.
Gail Morrison, Treas.
Shelly Fisher, Secy.
[illegible]
[illegible]
Peggy Castello
Betsy Donahue
[illegible]
Kevin Kinsley
[illegible]
Patricia Pasquarella
[illegible]
Ann C. Snyder
Mark K. Thomas
[illegible] Thompson
Charles T. Wilmerding
Ann L. Wilkes
Ex-Officio
Annemarie B. Torres
Geraldine Harnett
Jack Dwyer
Susan C. Rubenstein
[illegible] Miller
Sally Rothschild

Capital Campaign Booklet, The Cobb School, Montessori (Simsbury, CT)




Build The Dream
The Cobb School
MONTESSORI

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A nice summary piece built around the "need" and "plan," emphasizing a large "lead gift" as well as an attractive visual display of the facility and a clear disclosure of the costs.

[illegible]

[illegible]

Portia Corbett

John Kim

Portia Corbett

24 Years of Dedicated Service

[illegible]

[illegible]

Mary Lou Cobb at the Pet Parade, 1997

[illegible]

Capital Campaign Booklet, The Cobb School, Montessori (continued)

Mr David Winton

Rod Black, then

Windy Black, then

Rod Black, now

Windy Black, now

The Winton-Black Family Gift

On [illegible] The Cobb School, Montessori [illegible] a $[illegible] lead gift from the Win[illegible]. With this gift, the school is on its way [illegible]

[illegible] Winton-Black [illegible] years. Rod Black [illegible] Windy graduated in 19[illegible]. Rick [illegible] Board of Trustees for three years and [illegible] school [illegible] Board of Trustees [illegible] Annual Fund and Capital [illegible]

Mr Winton [illegible] school in 19[illegible] second [illegible] Mr Winton, who was then 81, [illegible] beams [illegible]

[illegible] extraordinary [illegible] We are indebted to the Winton-Black [illegible] over the years. Their [illegible] Montessori, is an inspiration to all.

Capital Campaign Booklet, The Cobb School, Montessori (continued)

The Need

T[illegible]

The Plan

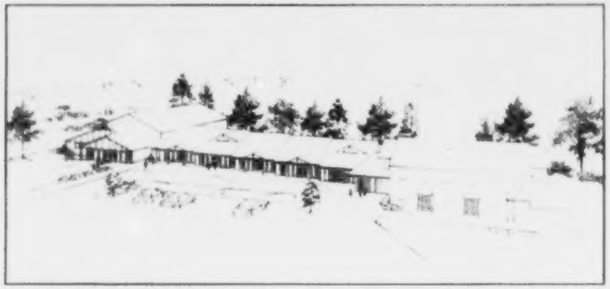
G[illegible]

Proposed Project Overview:

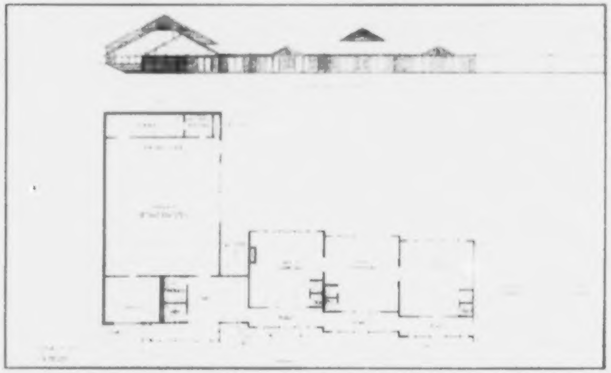
- [illegible]
- [illegible]
- [illegible]
- Pitched roof on main building to solve leaking problems, and to enhance the exterior aesthetics
- Forty additional parking spaces

Capital Campaign Booklet, The Cobb School, Montessori (continued)

Elevation



Floor Plan



Construction and Conversion Costs

Sources of Funds	
Mortgage and Capital Campaign	$1,000,000
Uses	
Construction Costs	[illegible]
• [illegible] Classroom Addition	
• Multi Purpose Room, including Library	
• Renovation of main building	
Demolition of Apartments	[illegible]
Parking & Site Improvement	[illegible]
• Water / Sewer Connection to Town	
• Relocation of Community Garden	
• Enlarge Playing Fields	
Professional Fees	44,000
• Architect	
• Civil Engineer, Attorney, Surveyor	
TOTAL	$1,000,000

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Planning Your Giving

The vision for The Cobb School is bold, and is founded in the belief that the children we serve are our greatest resource. The children, along with the extraordinary faculty, will be the ultimate beneficiaries of your generosity. [illegible] commitment to this place [illegible] can be [illegible] proud [illegible] to come.

We ask that you consider a gift that is a [illegible] all our families, grandparents and friends to make an outright donation or [illegible] payable over a period of years. The school will be happy to work with you to determine the most reasonable pledge payment plan. We also welcome in-kind donations appropriate to the [illegible] renovation project.

While most gifts come in the form of cash and securities, there are other gifts [illegible] can help you [illegible] capital gains [illegible] current income [illegible] and [illegible] for those [illegible] advantageous [illegible] contact [illegible] at the Capital Campaign [illegible]

Giving Levels

Golden Oak Guild	Gifts $20,000 or over
Leadership Guild	Gifts of $15,000-19,999
Founder's Guild	Gifts of $10,000-14,999
Oak Tree Guild	Gifts of $5,000-9,999
Acorn Guild	Gifts of $1000-4,999
Contributors	Gifts up to $1000

All gifts are appreciated, and it is through our collective generosity that the "Build the Dream" Campaign will achieve its goal of providing $1,000,000 to expand and enhance this fine school. Every gift of $5,000 or more will be recognized on a plaque to be permanently displayed at The Cobb School.

We encourage you to consider a naming gift that will allow you to [illegible] honor or memorialize [illegible] a friend or yourself. Please contact [illegible], Chair of the Capital Campaign Committee, to discuss [illegible] opportunities.

Capital Campaign Booklet, The Cobb School, Montessori (continued)

Volunteer Leadership

Board of Trustees

Executive Committee

[illegible]

Trustees

[illegible]

Advisory Board

[illegible]

Capital Campaign Leadership Committee

[illegible]

Members

[illegible]

Staff

[illegible]

The Cobb School
MONTESSORI

112 [illegible] Road
Simsbury CT 06070
Phone [illegible]

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Capital Campaign Brochure, The Cobb School, Montessori (Simsbury, CT)

Help to Build The Dream.

A quick read that conveys the purpose of the campaign on a page.

Pledge Card, The Cobb School, Montessori (Simsbury, CT)

This pledge card includes a space to indicate other family members to be contacted.

I want to help Build the Dream.

PLEASE RETURN THIS FORM WITH YOUR GIFT OR PLEDGE

My total gift pledge is $

I have enclosed $ ________ The remaining $

will be paid by June 1, 1999 or June 1, 2000

First pledge payment is due on or before June 1, 1998

I would like to contribute at the following level

- Golden Oak Guild [illegible]
- Leadership Guild [illegible]
- Founder's Guild [illegible]
- Oak Tree Guild [illegible]
- Acorn Guild [illegible]
- Contributors [illegible]

[illegible]

My gift will be matched by:

Please forward company's form with your contribution.

We encourage you to consider a naming gift and invite you to contact the school at 860.658.1111

Your gift is tax deductible to the extent provided by law.

[illegible]

Name

Address

City State Zip

Telephone

The above address/phone information is new

Parent of

Past parent of

Grandparent of

Alumnus

Friend

We would love to hear about you and your family:

Please make your check payable to:
The Cobb School
112 Sand Hill Road
Simsbury, CT 06070
phone 860.658.1111

The Cobb School
MONTESSORI

Capital Campaign Booklets, Milwaukee Montessori School (Milwaukee, WI)

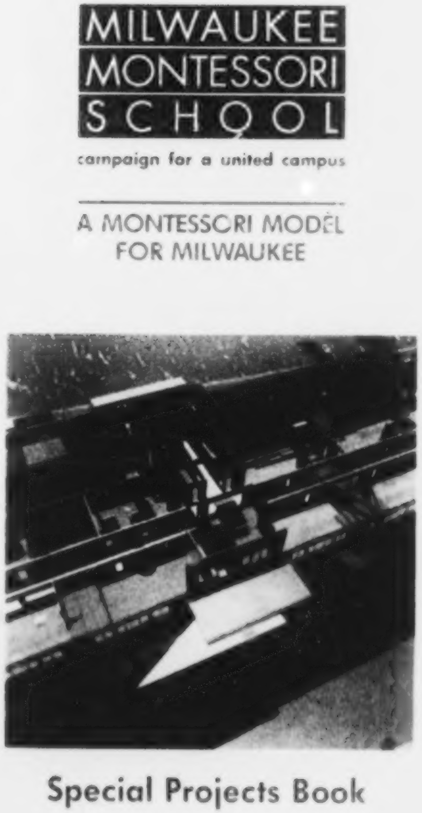
MILWAUKEE
MONTESSORI
SCHOOL
campaign for a united campus
A MONTESSORI MODEL FOR MILWAUKEE
Preparing the Environment

MILWAUKEE
MONTESSORI
SCHOOL
campaign for a united campus
A MONTESSORI MODEL FOR MILWAUKEE
Preparing the Child

What is special about these booklets is that they project an entirely Montessori context for the campaign, right down to their covers, which resemble Montessori material boxes. The slogan of the campaign is "A Montessori Model for Milwaukee," which expresses not only school pride but the usefulness of an integrated, privately-supported model for the area.

Special Projects Booklet, Milwaukee Montessori School (Milwaukee, WI)

Shown here are the cover and one sample page. The booklet gives a detailed architectural review of each feature of the expansion plan.

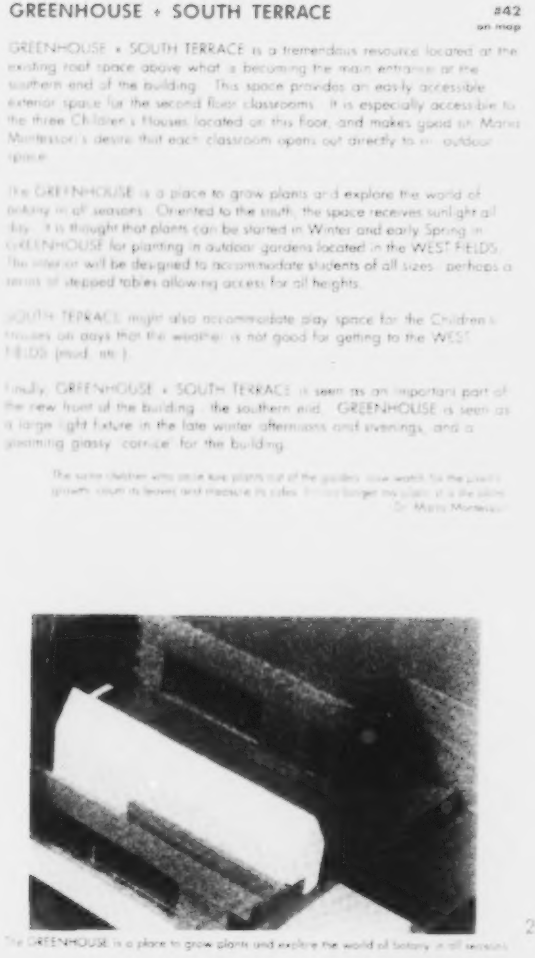


MILWAUKEE
MONTESSORI
SCHOOL

campaign for a united campus

A MONTESSORI MODEL
FOR MILWAUKEE

Special Projects Book



GREENHOUSE + SOUTH TERRACE

#42
on map

GREENHOUSE + SOUTH TERRACE is a tremendous resource located at the existing roof space above what is becoming the main entrance at the southern end of the building. This space provides an easily accessible exterior space for the second floor classrooms. It is especially accessible to the three Children's Houses located on this floor, and makes good on Maria Montessori's desire that each classroom opens out directly to an outdoor space.

The GREENHOUSE is a place to grow plants and explore the world of botany in all seasons. Oriented to the south, the space receives sunlight all day. It is thought that plants can be started in Winter and early Spring in GREENHOUSE for planting in outdoor gardens located in the WEST FIELDS. The interior will be designed to accommodate students of all sizes: perhaps a series of stepped tables allowing access for all heights.

SOUTH TERRACE might also accommodate play space for the Children's Houses on days that the weather is not good for getting to the WEST FIELDS (mud, etc.).

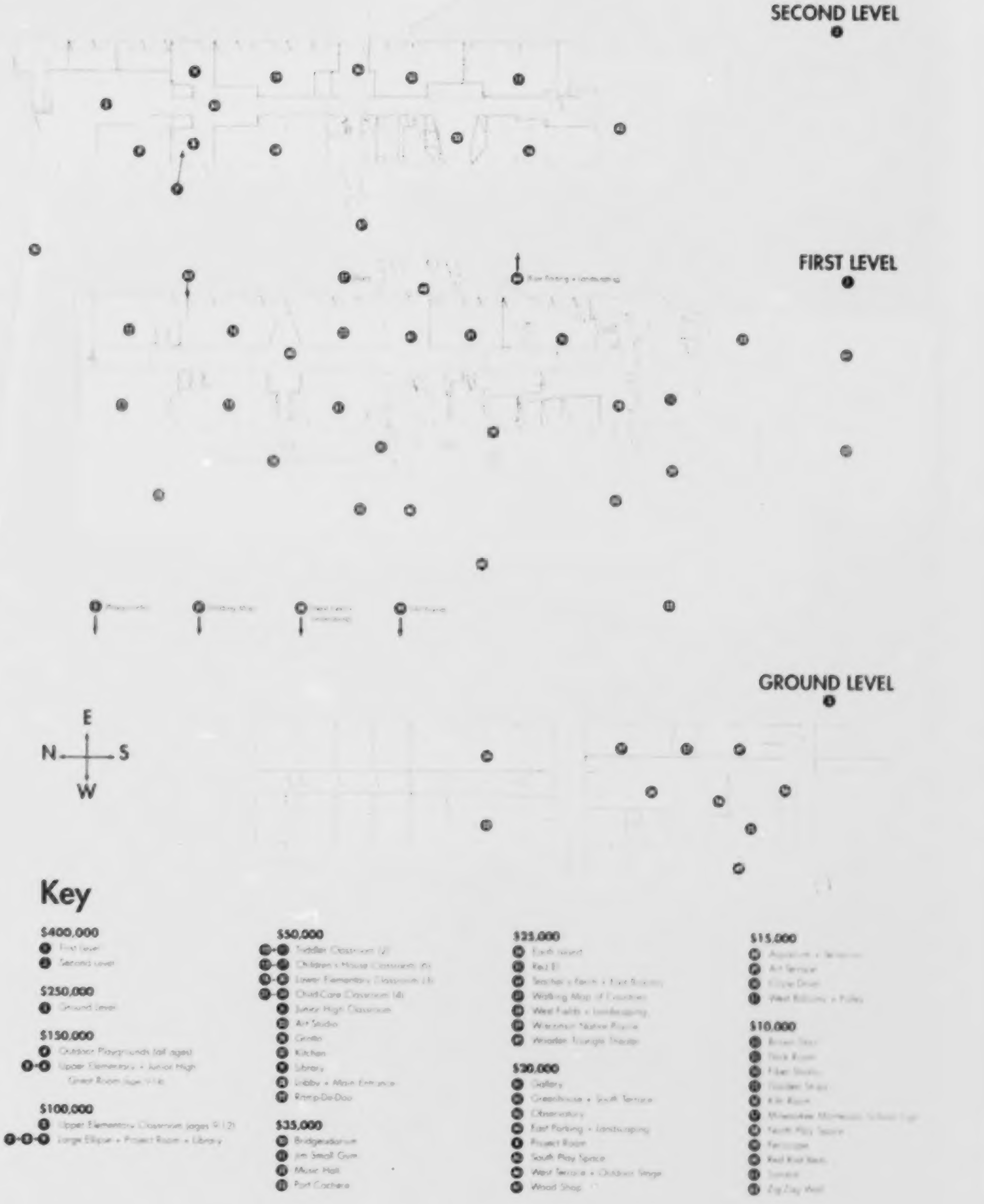
Finally, GREENHOUSE + SOUTH TERRACE is seen as an important part of the new front of the building: the southern end. GREENHOUSE is seen as a large light fixture in the late winter afternoons and evenings, and a gleaming glassy "cornice" for the building.

The same children who [illegible] plants out of the garden now watch for the plant's growth, count its leaves and measure its sizes. [illegible]
Dr. Maria Montessori

The GREENHOUSE is a place to grow plants and explore the world of botany in all seasons.

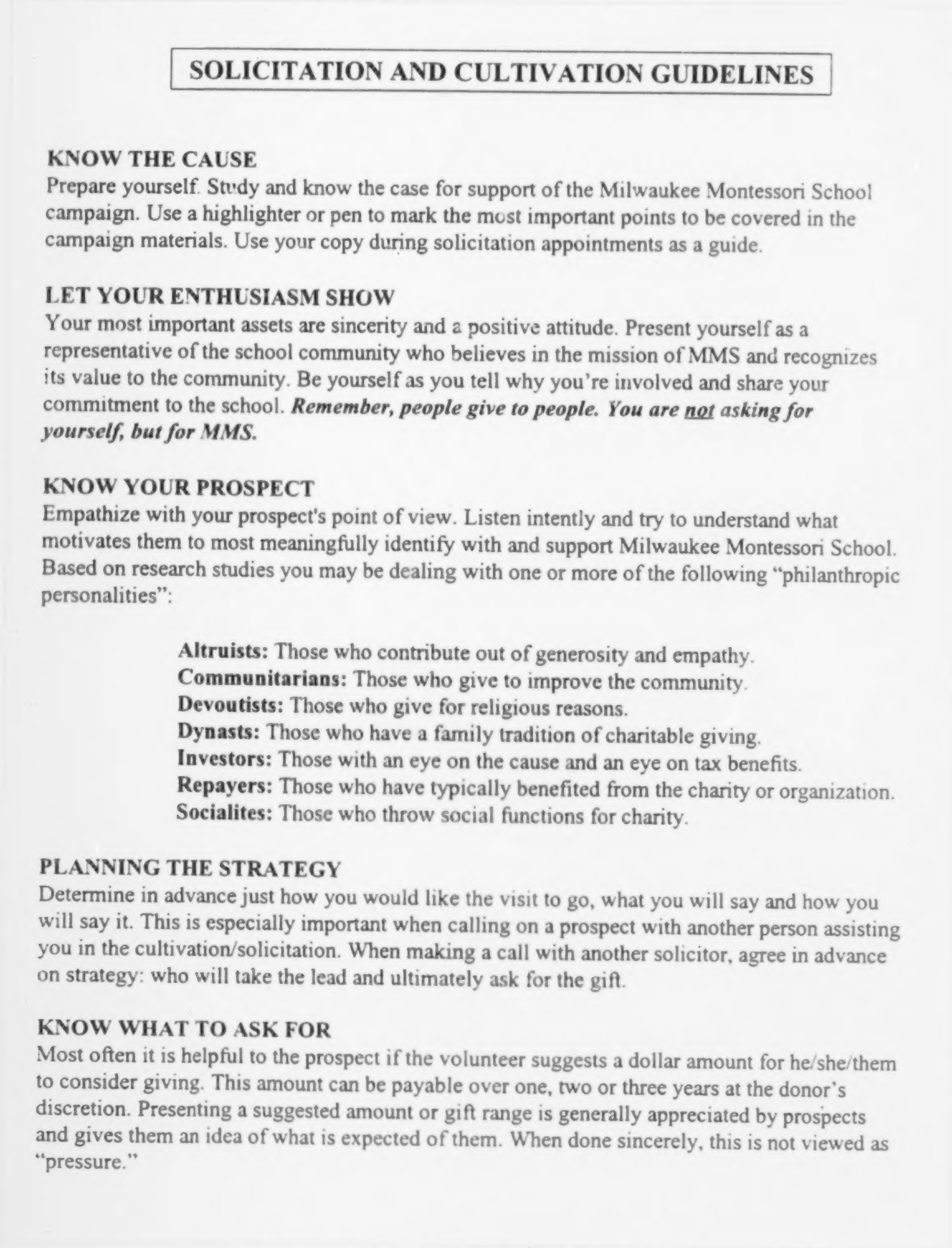
21

Special Projects Map, Milwaukee Montessori School (Milwaukee, WI)


SECOND LEVEL
FIRST LEVEL
GROUND LEVEL
E
N
S
W
Key
$400,000
First Level
Second Level
$250,000
Ground Level
$150,000
Outdoor Playgrounds (all ages)
Upper Elementary + Junior High Great Room (ages 9-14)
$100,000
Upper Elementary Classroom (ages 9-12)
Large Ellipse + Project Room + Library
$50,000
Toddler Classroom (2)
Children's House Classroom (6)
Lower Elementary Classroom (3)
Child Care Classroom (4)
Junior High Classroom
Art Studio
Grotto
Kitchen
Library
Lobby + Main Entrance
Ramp-De-Doo
$35,000
Bridgeatorium
Jim Small Gym
Music Hall
Port Cochere
$25,000
Earth Island
Red El
Teacher's Porch + East Balcony
Walking Map of Countries
West Fields + Landscaping
Wisconsin Native Prairie
Wooden Triangle Theater
$20,000
Gallery
Greenhouse + South Terrace
Observatory
East Parking + Landscaping
Project Room
South Play Space
West Terrace + Outdoor Stage
Wood Shop
$15,000
Aquarium + Terrarium
Art Terrace
Circle Drive
West Balcony + Pulley
$10,000
Brown Stair
Dark Room
Fiber Studio
Golden Steps
Kiln Room
Milwaukee Montessori School Logo
North Play Space
Periscope
[illegible]
Sundial
Zig Zag Wall

This poster-size piece demonstrates the cost of each architectural feature detailed in the Special Projects Booklet. Donors are encouraged to sponsor one particular component.

Parent Volunteer Training Materials, Milwaukee Montessori School (Milwaukee, WI)



SOLICITATION AND CULTIVATION GUIDELINES

KNOW THE CAUSE

Prepare yourself. Study and know the case for support of the Milwaukee Montessori School campaign. Use a highlighter or pen to mark the most important points to be covered in the campaign materials. Use your copy during solicitation appointments as a guide.

LET YOUR ENTHUSIASM SHOW

Your most important assets are sincerity and a positive attitude. Present yourself as a representative of the school community who believes in the mission of MMS and recognizes its value to the community. Be yourself as you tell why you're involved and share your commitment to the school. ***Remember, people give to people. You are not asking for yourself, but for MMS.***

KNOW YOUR PROSPECT

Empathize with your prospect's point of view. Listen intently and try to understand what motivates them to most meaningfully identify with and support Milwaukee Montessori School. Based on research studies you may be dealing with one or more of the following "philanthropic personalities":

Altruists: Those who contribute out of generosity and empathy.
Communitarians: Those who give to improve the community.
Devoutists: Those who give for religious reasons.
Dynasts: Those who have a family tradition of charitable giving.
Investors: Those with an eye on the cause and an eye on tax benefits.
Repayers: Those who have typically benefited from the charity or organization.
Socialites: Those who throw social functions for charity.

PLANNING THE STRATEGY

Determine in advance just how you would like the visit to go, what you will say and how you will say it. This is especially important when calling on a prospect with another person assisting you in the cultivation/solicitation. When making a call with another solicitor, agree in advance on strategy: who will take the lead and ultimately ask for the gift.

KNOW WHAT TO ASK FOR

Most often it is helpful to the prospect if the volunteer suggests a dollar amount for he/she/them to consider giving. This amount can be payable over one, two or three years at the donor's discretion. Presenting a suggested amount or gift range is generally appreciated by prospects and gives them an idea of what is expected of them. When done sincerely, this is not viewed as "pressure."

A packet of materials for training volunteer solicitors.

Parent Volunteer Training Materials, Milwaukee Montessori School (continued)

TIMING IS CRITICAL
Cultivation of the prospect is important in order to nurture interest, relationship and understanding. When under pressure to produce results or just to get your solicitations completed, there is a temptation to move too quickly with a prospect by asking for the gift too soon. The gift needs to be made on the prospect's time schedule, not yours.

USE EXTENDED PAYMENTS
Many prospects will respond more readily if asked to consider a certain amount payable over multiple years. The pledge card allows them to indicate their payment plans over a three-year period beginning 7/1/97 and ending 6/30/2000.

USE CARE ON A "TOO SMALL" GIFT OR PLEDGE
Don't be too quick to accept a gift or a pledge you consider "too small." Suggest that the decision be postponed. Ask the prospect to take a little more time to think about what he/she/they might do. Remember, pledges can be paid in cash, stock or property over multiple years. For more information on stock and property gifts, call MMS.

DON'T GIVE UP
Raising financial resources takes motivation and enthusiasm. When done with commitment and honesty, it is one of the most rewarding activities in which you will ever engage. It is easy to resist a half-hearted persuader. After all, you must persuade yourself first. You need to begin with the conviction that comes from supporting the campaign yourself.

"Giving campaigns fail not because people don't give, but because they are not asked."

REMEMBER: ***You are responsible for the effort, not the outcome.***

SETTING THE APPOINTMENT

Sometimes, setting the appointment is the hardest part of cultivating and soliciting a prospect — either because you're holding back, or because the prospect is especially hard to reach. Most often, once you get beyond these initial barriers, it will go well. Be aware, however, that not everyone will automatically say, "I/We will be happy to meet with you." Some persistence on your part may be what is required.

Suggestions:

- Get the right person on the telephone when you call. Do not leave a message with a child or babysitter. Determine when you can call back if another person answers.
- Begin by introducing yourself and explaining why you are calling.
- Ask for an appointment. Suggest two or three dates/times that you have free to help with the prospect's "decision making" process.
- Clarify directions to the prospect's home or office if you are not certain of where to go.

SAMPLE SCRIPT

"Good afternoon, my name is ____________. Like yourself, I'm a parent of a Milwaukee Montessori School student. How are you this afternoon?

"I'm calling because I'm a volunteer with the Parent Division of the capital campaign for the new school. I'm excited about what this is going to mean for our children and families, and would like to set an appointment to meet with you and your spouse to review the campaign materials and talk about how we as parents can help.

"Would you (and your spouse) be available to meet with me at your home (or office) on (suggest several dates/times) or would another day be better?

"Good. I look forward to meeting with you. (Restate time, date and place.) Get directions if needed.

Parent Volunteer Training Materials, Milwaukee Montessori School (continued)

Possible Objections

Prospect: We're aware of the project. Just send us the materials and pledge card.

You: That would be easy, but there have been so many new developments in the plans in recent weeks, along with a whole new set of campaign materials. It would mean a great deal to me personally if I could hand deliver and review them with both you and your spouse.

Prospect: We already pledged the first time. There is no need to come over.

You: Thank you so much for the leadership you've already shown. That means a great deal to all of us, students and parents. There have been so many new developments in the plans in recent weeks, along with a whole new set of campaign materials. It would mean a lot to me personally if I could hand deliver and review them with both you and your spouse.

YOU ARE PREPARED TO ASK FOR A GIFT WHEN . . .

- You have made your own financial commitment to the campaign.
- You have studied and understand the needs and goals of **A Montessori Model for Milwaukee Campaign**.
- You have assessed the giving potential of your prospect(s).
- You have set an appointment for a personal meeting with your prospect(s).

STEPS TO A SUCCESSFUL VISIT

Present the case	Review **A Montessori Model for Milwaukee Campaign** case materials.
Tell your story	Your enthusiasm for Milwaukee Montessori School will be contagious. Tell your prospect why you believe in this project and why you have become involved. Let them know that you have made a financial commitment.
Ask them	Share the cover letter with your prospect and briefly highlight each paragraph. (The letter invites them to consider a gift in a specific amount payable over one, two or three years.)
Listen to their response	They will either say "yes or no" or "I need time to think it over."
Respond	Take the necessary time to listen to their reaction and feedback to your request. Use this time to respond to all questions, comments and concerns the prospect(s) may have regarding the request. If you cannot answer a question, state that you will research it and get back to them with an answer. Then follow through by contacting MMS with your unanswered questions.

Parent Volunteer Training Materials, Milwaukee Montessori School (continued)

Negotiate	If they say no to your request, ask them **what** they might consider. Then agree on the highest commitment possible after gentle negotiation.
Fill out the pledge card	Take the pledge card out of the campaign packet after you have received a positive response. Read through the card with the donor so that they understand it. Ask that they fill out the pledge card, place it in the reply envelope and give it to you for return to MMS.
Thank them	A donor's generosity is a symbol of their commitment to the school, quality education and to the success of this project. Extend your personal thanks and gratitude on behalf of MMS and campaign leadership.
Report	Completed pledge cards should be returned to the MMS' State St. office in person or via mail.

CAPITAL CAMPAIGN VS. ANNUAL FUND

Our special capital campaign is in addition to the Annual Fund drive, which raises money for the **operating budget only.** It is important to clarify the difference between these two programs so that donors are not confused. Since the Annual Fund **helps balance** the operating budget, it will run concurrently with the current capital campaign. **Parents will receive a separate request letter for the 1997-'98 Annual Fund in early December.**

Parent Division Campaign Schedule

Week of October 13th	Campaign Steering Committee members solicited
October 13th at 5:30 p.m. **October 15th at 7 p.m.**	Orientation/training of parent volunteers (same)
Week of October 20th (or ASAP)	Steering Committee members solicit Parent Division leaders; Parent Division leaders solicit parent volunteers
Week of October 27th (or ASAP)	Parent volunteers solicit parent prospects
Friday, November 14th	Parent solicitations complete (unless prospect asks for more time/is not ready to make a commitment). Pledge cards returned to MMS' State St. office

STEPS TO COMMITMENT

IDENTIFY

INFORM

INVOLVE

INTEREST

INVESTMENT

Parent Volunteer Training Materials, Milwaukee Montessori School (continued)

NEXT STEPS FOR PARENT VOLUNTEERS

1. Complete and turn in before leaving tonight the yellow *Prospect Assignment Form* with the names of your prospects.
2. Pick up a packet of campaign materials for each of your prospects.
3. Sign the cover letter inside the red folder of each packet.
4. Set up an appointment to meet with each of your prospects individually.
5. Review information materials so that you're familiar with what is included therein:
    - Cover letter
    - Case materials (booklets: *Preparing the Child* and *Preparing the Environment*, Special Projects Map, supplementary information sheets)
    - Pledge card/envelope
6. Meet face-to-face with each of your prospects.
7. Return the sealed pledge envelope to MMS' State St. office as soon as possible or **by Friday, November 14, at the latest.** Gift acknowledgments and thank-you letters will be sent by MMS.

IN THE END

If you have questions, please don't hesitate to call Mary Kenngott or Amy Neuenfeldt at 259-0170. If a prospect chooses not to support ***A Montessori Model for Milwaukee Campaign*** *at this time, please tell them it is vitally important that we be able to demonstrate 100% parent support in order to secure other corporate and foundation gifts. Any gift they could give at this time would be applied toward that 100%. Or, they could make a pledge to be paid at a later date.*

PROSPECT ASSIGNMENT FORM

I have selected the following prospects to cultivate and solicit for the MMS capital campaign:

1. ______________________________

2. ______________________________

3. ______________________________

4. ______________________________

5. ______________________________

6. ______________________________

Signature of Parent Volunteer: ______________________________

Phone number (day): ______________ **Phone number (eve/wknds):** ______________

Comments: ______________________________

____

____

____

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Long-Range Planning

Introduction

Given the changing educational environment, long-range planning is more and more necessary for Montessori schools, especially larger schools. National teacher shortages, higher salaries in public schools competing with Montessori salaries, attractive schools of choice (charter schools), and the fluctuations of the economy all mean that Montessori schools must give attention to their planning. Planning means readiness, which is better than being surprised. As schools age, they can no longer afford to be dependent on a few leaders with plans locked up inside their heads.

Creating the Long-Range Plan

The Long-Range Plan (LRP) is a collective process. It means externalizing the plan so that everyone can participate. The LRP is a consensus document, if not an endorsement to move ahead, made by parents, board, faculty, and administration. Universal involvement means that everyone owns the plan. This is achieved through full-day meetings, retreats, and committee meetings–a complex process, which may require a professional facilitator.

See the list of long-range planning consultants in Appendix 4.

When formulating a long-range plan, a school must decide on whether or not to expand to a full administrative staff, including a business manager, director of development, admissions director, etc. A professional administrative staff may result in higher tuition, changing the character of the school. Administrative salaries and expenses must be kept in balance with program expenses; generally, the administrative category should stay below one-third of the total budget.

See chapter 3 for information on budget categories.

Long-range planning involves every aspect of the school's operations: curriculum, specialty subjects, building expansion and improvement, finances, parent involvement and education, faculty evaluation, program assessment, and, of course, the child's total development. The LRP must reflect a deeply held Montessori perspective. It is a living document; it must engage the school community as it is discussed, rethought, and rewritten to fit the evolving status of the school. Usually it is based on a five-year time frame.

The Montessori school's LRP will need to address the evolution of the school toward what it should be, in the ideal. What part of the developmental continuum can be realized? What about a toddler or adolescent program? How large should our enrollment become? What is the role of our specialty classes? How can we maintain the three-hour work cycle? What do we do to enhance our Montessori roots in our parent education programming? How do we balance teacher growth and Montessori depth? How do we build an overview of the emerging Montessori child? How do we assess our programs in the absence of unique instruments, which are yet to be developed? The LRP is a tool that comes out of traditional private school management. The Montessori LRP, then, must reflect goals consistent with Montessori values and philosophy.

See Chapter, 11 for a discussion of assessment instruments

The LRP must consider the school as part of the community, state, even country, at large. It could include neighborhood demographics, the impact of all-day programming, the state of the local school district, the mean income of families enrolled in the school, the availability of Montessori teachers, competing local private schools, the number of students in the area seeking private education, educational trends, etc.

The Strategic Financial Plan

Another important part of the LRP is the fiscal projections of the school, sometimes referred to as the Strategic Financial Plan (SFP). Like the projections and integrated capital drive demonstrated above, the SFP is set up to establish funding needs over multiple years and then fine-tune revenues and expenses from year to year by looking at strategic factors. The main purpose is to guarantee solvency and ability to adapt to change. Having an SFP means that decisions about raising tuition and teacher salaries are resolved ahead of time, reserve funds and endowments are planned for, and the whole community is informed about fiscal polices governing financial decisions. Usually SFP financial summaries are brief, showing enrollment, revenues and expenses, cash reserves, and endowments, without going into the minutia of line items for every category of revenues and expenses (see the example in this chapter's Sample Documents). The SFP usually needs updating every three years, even though it usually contains projections for five years.

If an SFP is formulated or presented apart from an LRP, it should include, in abbreviated form, some of the same background information mentioned above for the LRP: community demographic and educational trends; plans for expanding, enhancing, and assessing the Montessori program; etc.

The formulation of a Long-Range Plan requires knowledge of both the Montessori program and school administration. Careful linking of curriculum and fiscal operations produces a fully integrated future plan.

Endowments

Most Montessori schools do not have endowments; they have cash reserves which they choose not to refer to as endowments. Officially an endowment is an investment portfolio whose principal remains untouched, with the interest (or part of the interest) becoming available for the school's use. It is desirable to manage the fund so that some of the interest is re-invested, allowing the fund to grow even without ongoing contributions.

Since annual giving is used for keeping tuition down and capital campaigns are used to raise funds for facilities, the endowment can be earmarked for creative uses and enhancements that are less operational but in keeping with the school's qualitative mission. Financial aid, significant professional development, guest faculty, fine arts programming, program redesign, teacher grants, collateral for expansion loans, etc., are all appropriate uses. It is important, as mentioned before, to keep operations as close to self-sufficiency as possible so that the endowment can be applied to special causes.

For a school with a significant capital reserve, one strategy to start an endowment is to designate a certain portion of the reserve to function as an endowment. This reduction of the reserve creates a greater perceived need to raise money for operations, thereby reinvigorating fundraising efforts. Meanwhile, the simple existence of an endowment fund provides incentive to raise funds to increase it as well.

An endowment fund provides an appropriate occasion to encourage estate planning or life insurance gifts. Grandparents in particular may wish to designate a percentage of their estate to the school's endowment plan.

Frequently Asked Questions

What kind of process does it take to do a long-range plan?

A true long-range plan is a huge effort. The following steps were taken at the Montessori School of Raleigh (NC), with consultation from Independent School Management, Inc. (see Appendix 4 for contact information):

- School administration submitted a 200-page assessment for ISM's analysis.
- ISM conducted 28 interview sessions with a total of 40 people, including administration, faculty, board members, 16 parents, and 6 students.
- A constituent survey was developed, 800 copies were mailed out, and 200 were returned and tallied.
- ISM conducted two retreats with a cross-section of constituents.
- Retreat participants formed a steering committee, whose members led separate groups organized around management and governance, academic and instructional programs,

new and special programs, facilities and equipment, external affairs, and institutional advancement.

- In an intensive four-month formulation and review process, ISM consultants drafted the long-range plan in installments, while the steering committee worked with constituents to revise it. The final long-range plan was approved by the board.

Is a fully developed long-range plan worth the time and money? Why can't a long-range plan simply be brainstormed by the head of school and executive committee and then presented to the full board?

A formal long-range planning process, as conducted by the Montessori School of Raleigh, is common for well-endowed independent schools. Although it requires extensive resources and personnel, it is rigorous and worthwhile. Nevertheless, many schools choose to take a less formal approach. Whatever the procedure, a long-range plan should take into account every aspect of the school, including finances, pedagogy, funds development, special facility upgrades, capital campaigns, etc.

Sample Documents

The following documents illustrate common practices in Montessori school operations. To view documents at full size, photocopy and enlarge.

Strategic Financial Plan, Montessori School of Lake Forest (Lake Forest, IL)

VI Financial Plan

A financial plan has been prepared using the budgeting model to illustrate the financial impact of the strategic plan. The key premises of this plan have been laid out in the preceding strategic objectives.

Financial Plan 1995 - 2000

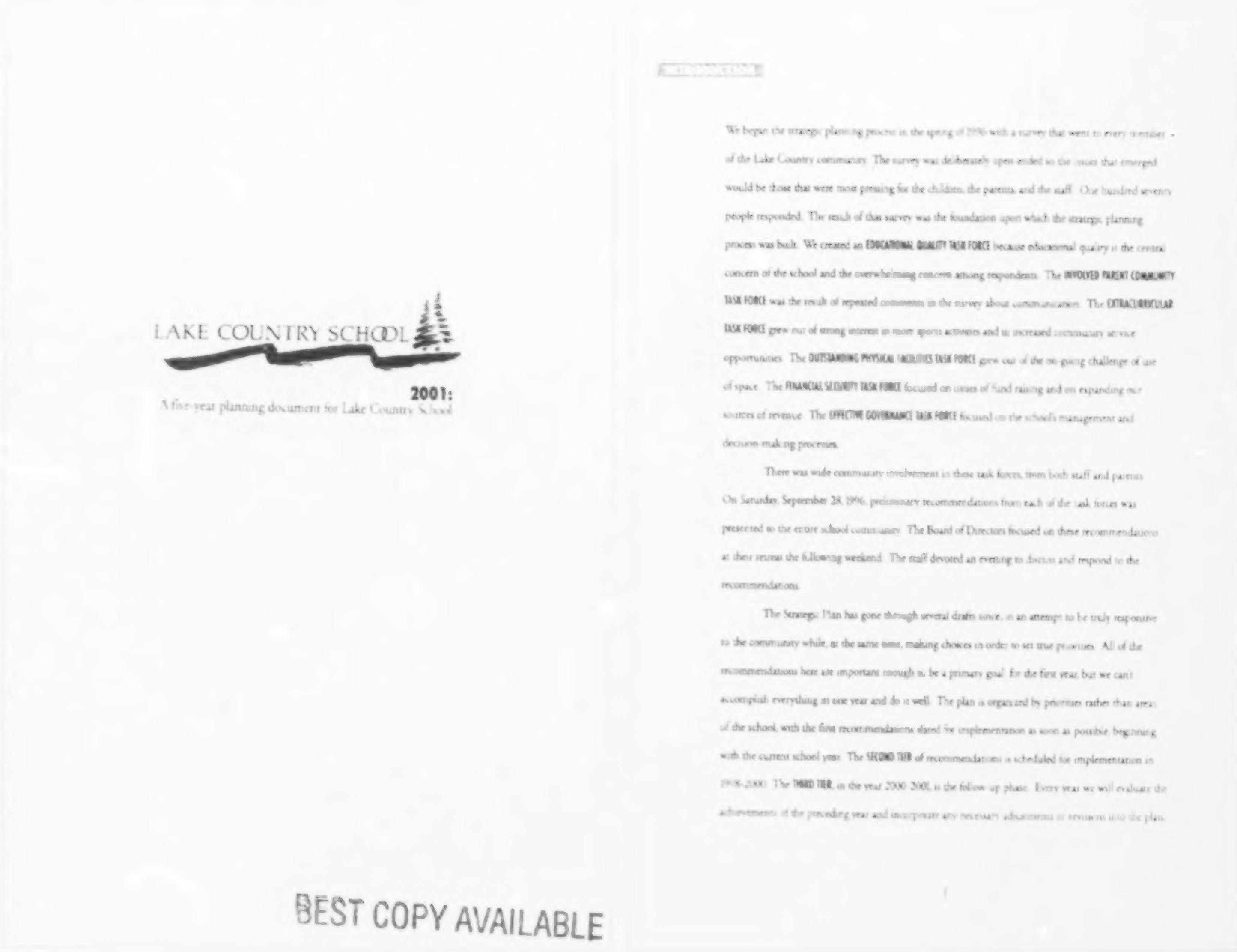
	1995/96	1996/97	1997/98	1998/99	1999/00
Enrollment	**229**	**240**	**260**	**271**	**281**
Revenues	1,594	1,753	1,974	2,146	2,307
Expenses	(1,344)	(1,493)	(1,578)	(1,652)	(1,725)
Operating Income	250	260	396	494	582
Bond Payment	(250)	(250)	(250)	(250)	(250)
Net Surplus	**0**	**10**	**146**	**244**	**332**
Capital Fund Raising		300			
Grants for Financial Aid			15	20	25
Annual Giving			50	50	50
Elementary Expansion		(265)			
Multipurpose Room				(350)	
Toddler Expansion					(75)
Outdoor Enhancements					(100)
Maintenance Capital			(50)	(50)	(50)
Cash Reserves	**0**	**45**	**206**	**120**	**302**

The school is committed to managing its operations and finances to make the semi-annual bond payments. Other key financial objectives include the preparation of an annual budget, management of the expense budget, and control of capital expenditures in line with available funds. Minor repairs are projected to be covered by annual operational revenue. Annual fund raising provides for enhancements of the School.

The school's accounting firm recommends the buildup of a cash reserve of three months of operational expense to provide a cushion during the year for the uneven revenue stream and for unexpected expenses. The school will create this reserve over the plan period.

Financial shorthand for quick reference, typical of an SFP.

Long-Range Plan, Lake Country School (Minneapolis, MN)



LAKE COUNTRY SCHOOL

2001:
A five-year planning document for Lake Country School

[illegible]

We began the strategic planning process in the spring of 1996 with a survey that went to every member of the Lake Country community. The survey was deliberately open ended so the issues that emerged would be those that were most pressing for the children, the parents, and the staff. One hundred seventy people responded. The result of that survey was the foundation upon which the strategic planning process was built. We created an **EDUCATIONAL QUALITY TASK FORCE** because educational quality is the central concern of the school and the overwhelming concern among respondents. The **INVOLVED PARENT COMMUNITY TASK FORCE** was the result of repeated comments in the survey about communication. The **EXTRACURRICULAR TASK FORCE** grew out of strong interest in more sports activities and an increased community service opportunities. The **OUTSTANDING PHYSICAL FACILITIES TASK FORCE** grew out of the on-going challenge of use of space. The **FINANCIAL SECURITY TASK FORCE** focused on issues of fund raising and on expanding our sources of revenue. The **EFFECTIVE GOVERNANCE TASK FORCE** focused on the school's management and decision-making processes.

There was wide community involvement in these task forces, from both staff and parents. On Saturday, September 28, 1996, preliminary recommendations from each of the task forces was presented to the entire school community. The Board of Directors focused on these recommendations at their retreat the following weekend. The staff devoted an evening to discuss and respond to the recommendations.

The Strategic Plan has gone through several drafts since, in an attempt to be truly responsive to the community while, at the same time, making choices in order to set true priorities. All of the recommendations here are important enough to be a primary goal for the first year, but we can't accomplish everything in one year and do it well. The plan is organized by priorities rather than areas of the school, with the first recommendations slated for implementation as soon as possible, beginning with the current school year. The **SECOND TIER** of recommendations is scheduled for implementation in 1998-2000. The **THIRD TIER**, in the year 2000-2001, is the follow-up phase. Every year we will evaluate the achievements of the preceding year and incorporate any necessary adjustments or revisions into the plan.

BEST COPY AVAILABLE

This document balances Montessori concerns with more generic institutional planning. It shows comprehensive analysis of every aspect of the school, each worked out by a task force that includes the diversity of viewpoint necessary to get a range of opinion, good participation, and therefore real ownership.

The process itself has been revealing and events have shifted priorities even as we've worked on the plan. For example, the unexpected ease with which we were able to shift the beginning of our school day to 8:30 a.m. next year removed the main challenge to our first priority, preserving the three hour work period for the Children's House and Elementary levels. So, we expect this document to be a living, evolving plan. Its power is in the wide participation and the good thinking and research that has produced it.

You will note that the next pages detail **PLANNING CONSIDERATIONS** and **ANNUAL COMMITMENTS**. These are the backbone of the plan. In the enthusiasm to make new plans, the Steering Committee felt it essential to state clearly the planning considerations that inform those plans and to iterate our on-going annual commitment to the quality and culture of the school, to the excellent staff, to diversity, to beautiful environments, to fund raising, and to our effective governance process.

The Board unanimously approved the Strategic Plan and Implementation Schedule at their January 16, 1997 meeting. The process of engaging in the planning process has already produced recognizable results: implementation has begun on all of the immediate recommendations and work has started on some of the intermediate recommendations as well. We invite you to choose an area of interest and to participate in the next stage of the process.

We look to the implementation of these visions and goals with optimism and faith in the collaborative efforts of staff and parents and hope that the community-wide involvement of the planning process will continue into the implementation phase. The Lake Country community, anchored by a shared vision of childhood and by a common commitment to the school, moves forward with these plans well prepared.

John Lawlor
Co-Chair

Margaret Shreves
Co-Chair

Kathe [illegible]
Principal

Long-Range Plan, Lake Country School (continued)

Lake Country School is an urban-based Montessori community whose purpose is to help children prepare themselves for life. We seek to mirror the rich diversity of our urban community. We foster independence, critical thinking, respect and responsibility to self, to others, and to the earth.

Our goal is to educate the whole person empowered by positive self-esteem. This person is self-directed, honest, joyful, cooperative, adaptable, physically fit, creatively expressive, inspired with a love of learning, a sense of history and an awareness of cultural and cosmic interdependencies.

We follow the principles and philosophy of educator Maria Montessori, incorporating the work of others in fields of developmental psychology and education. We observe and follow the child to aid each in realizing his or her unique potential. We use environments prepared for developmental age groupings, concrete educational materials and aids to the imagination. The staff, trained professionals in partnership with parents, serve as guides and facilitators. We seek, as an adult community, to model healthy interpersonal relationships. We foster diversity and strive to create situations in which the expression of differences leads to understanding and appreciation. We provide an atmosphere of trust where there is opportunity for choice and where work is expected and respected.

BEST COPY AVAILABLE

[illegible]

EDUCATIONAL QUALITY COMMITTEE
Co-Chairs: **Mindy Holt, Bill Drake, Anne McLoughlin**

Carolyn Halliday
Jean Mehon
Larry Schaefer
Nancy Lawler
Richard Rose
Bob Markman
Christine McVay
Carolyn Fisk
Kathy Coakran

Linda Allen
Gail Westgate
Dana Moore
Jane Kern
Mary Neal
Paulette Zoe
Patricia Bachmeier
Luann Brown

Barb Ertz
Sara Nelson
Kris Schaefer
Melody Allen
Mary O'Brien
Meg Sandler
Joyce Mitchell
Andy Brown

INVOLVED PARENT COMMUNITY
Co-Chairs: Ann Lane, Nanci Olesen, Stephen Epp

Mary Jackley
Virginia Clark
Kate Stanley Ross
Marcy Vinall

Carolyn Bowlin
Anne McLaughlin
Peter Janak

Christel Donovan
Nancy Lawler
Candy Champeau

DIVERSE EXTRA-CURRICULAR PROGRAMS
Co-Chairs: Sarah Endsley, Duane Black

Lenore Heater
Tim Cravens
Joanne Sunquist
Kris Nelson

Tom Hedberg
Alfredo Barrows
Meg Sandler
Jackie Hayes

Katherine McClure
Leigh Hansen
Jill Olsen
Stuart Mason

FINANCIAL SECURITY
Co-Chairs: Kevin Dooley, Dave Neal

Rick Londer
Kim Bentz
Susie Goldberg
Kathy Coakran

Bill Marshall
John Lawler
Win Rockwell

Lucinda Anderson
Hal Goldman
Molly O'Shaughnessy

OUTSTANDING PHYSICAL ENVIRONMENTS
Co-Chairs: Dean Thomson, Kirstin Sederdahl

Doug Almer
Joseph McDermott

Tom Hedberg
Pat deLaire

Candy Champeau

EFFECTIVE GOVERNANCE
Co-Chairs: Cathy Polesky, Joe St. Marie

Patty Bachmeier
Rick Londer

Eve Bornstein
Kyle Mansfield

Kathy Coakran
Molly O'Shaughnessy

PLANNING CONSIDERATIONS

The implementation of the recommendations of this strategic plan will be informed by the following:

**Lake Country School is a child-centered school,
inspired by and committed to the vision of Maria Montessori.**

*The school's first priority is the creation and preservation
of Montessori environments for children.*

**Lake Country families and staff express
a high level of satisfaction with the educational philosophy
and school community including its size.**

*The recommendations focus on enhancing an already excellent
educational community.*

**Lake Country School is committed to
achieving a community that is rich in the diversity of economic
and social classes, racial and ethnic heritages, religious and spiritual beliefs,
physical abilities and family structures that are found
in the larger society.**

*Enhancing the diversity of the school is an implied component
of each of the recommendations.*

**Lake Country's leadership model will continue to vest pedagogical authority
in the head of the school including the final decision to implement the
strategic planning recommendations of the Board of Directors.**

**Lake Country is committed to sound financial planning for the future
as well as for the present.**

**Lake Country's resources are limited and ten percent of our operating budget
currently depends on fund raising.**

*Therefore, the implementation of these strategic recommendations is heavily influenced
by the availability of financial resources where needed.*

Long-Range Plan, Lake Country School (continued)

ANNUAL COMMITMENTS

There are certain constants that inform our annual planning process. These constants are [illegible] the priority areas that are priority in the plan for each year.

1. The number one priority and commitment of both the Lake Country Staff and the Board of Directors is to preserve and protect the quality and culture of the school. We recognize that any living, growing [illegible] is a fragile entity and seek to ground our on-going work in the founding beliefs of the school.
    - We are a Montessori school.
    - We are an urban school.
    - We are a child centered school.

2. We are committed to maintaining and retaining an excellent, highly qualified staff who share and [illegible] the philosophy and mission of Lake Country School.
   We shall:
    - Provide a rich and nourishing professional environment for staff.
    - Continually strive to improve staff compensation and benefits.
    - Expand and diversify professional development opportunities for staff.
    - Provide opportunities for staff to share their professional expertise.
    - Create links with local, regional, and national schools and educators to enhance staff development and to broaden the staff's work in parent education.

3. We believe that the experience of diversity (diversity of race, gender, ethnic origin, [illegible] and [illegible]) is central to a rich contemporary learning environment as well as a necessary preparation [illegible] to meet the world with confidence and courage.
   We are committed to:
    - Actively supporting the work of the Diversity Committee of the Board which assumes the development of a community rich in diversity and in the ability to interact in a non-gender based manner.
    - Actively seeking diversity when sponsoring, recruiting, or hiring staff.
    - Supporting the Montessori training of members of underrepresented groups.

ANNUAL COMMITMENTS

4. We are committed to the principle of the prepared environment and believe that beautiful, well maintained indoor and outdoor spaces are essential to the quality of the school.
   We shall:
    - Insure that there are adequate moneys in the operating budget to maintain and continually upgrade the current physical facilities.
    - Complete the current plan for the playground and other outdoor environments.
    - See **EXHIBIT A** for complete description.

5. We are committed to the stewardship of the earth and to increased awareness of environmental issues among the Lake Country community.
   We shall:
    - Recycle and use either recycled or non consumable products.
    - Use environmentally safe products in every area of the school.
    - Be environmentally aware in making decisions.
    - Move towards a more environmentally aware lunch program.
    - See **EXHIBIT B** for a complete description of the school's environmental policy and goals.

6. We believe that full participation from Lake Country families and staff in the Annual Fund is a powerful affirmation of the community.
    - The Annual Fund is the primary fund raising activity in the fall.
    - Fund raising efforts should be coordinated by the Development Committee of the Board and the staff person offering support to that Committee.
    - The special event fund raiser in the spring should foster participation and a sense of community and should focus on a specific cause or goal of the school.

Long-Range Plan, Lake Country School (continued)

7. The Board shall follow a formal decision making and management process for new programs and major projects. The Board shall:
   - Evaluate the impact of a proposed program or project on the school's [illegible]
   - Consider the role of the program or project in the strategic plan and [illegible] strategic plan
   - Set a budget for the program or project for the approval of the Board
   - Designate responsibility for program or project management [illegible]
   - Establish regular reporting to the Board
   - Evaluate the success of the program or project upon completion

8. [illegible] the Board shall evaluate itself and the Principal [illegible] the Board shall:
   - Adopt the [illegible] model for evaluation of the performance of the Principal [illegible]
   - In its annual review of the Strategic Plan, allow for new circumstances and opportunities

IMMEDIATE (FISCAL/SCHOOL YEAR: 1997-98)

1. **Vision:** The protected, three hour work cycle is central to Montessori pedagogy and to the children's developmental needs.

   Goal: Ensure that a three hour work cycle is possible for Lake Country Children's House and Elementary students.
   - Evaluate classroom schedules in light of earlier start time.
   - Improve the work flow of the students, both in the classroom and with specialists.

2. **Vision:** The structure and focus of our midday and extended day programs should be informed by the philosophy of the school and by the developmental needs of the children.

   Goal: To create a program for our three- and four-year old children that is in concert developmentally with the Children's House programming.
   - Study and evaluate the concept of All Day Montessori.
   - Continue to experiment with the current Midday program.

   Goal: To develop an extended day program that more adequately serves the needs of elementary children from three to six p.m.
   - Restructure the extended day program for the 1997-98 school year.
   - Consider the recommendations of the Extracurricular Task Force. **EXHIBIT C.**

3. **Vision:** Beautiful, prepared environments are central to the work with the children in a Montessori school.

   Goal: To renovate the elementary levels of the school including the specialist classrooms.
   - Obtain previous renovation plans and consult with staff and professional designers.
   - Explore funding options (capital campaign vs. increased mortgage).

   Goal: To improve acoustics in the gym.
   - Implement current recommendations of Building Committee. **EXHIBIT A.**

   Goal: To improve assembly and performance space.
   - Explore creative options, including shared spaces.

[illegible]

4. Vision: [illegible] a second language is highly valued by the community for all the students of the school

Goal: To evaluate and re-articulate the goals of the second language program.

- Examine issues of fluency as a goal in the second-language program
- Evaluate the expansion of Spanish as a club or program

5. Vision: Lake Country School is committed to reconnecting with its alumni/ae [illegible] its connections to the extended families of students, particularly grandparents.

Goal: Increase involvement and activities of alumni/ae in the school

- Create an Alumni/ae Council.
- Update alumni/ae and alumni/ae family information in data base
- Create several annual alumni/ae events.

Goal: Expand outreach to grandparents

- Plan special opportunities for grandparents in addition to increasing involvement in school intergenerational functions.

Goal: Hire an alumni/development/special events professional to provide organizational support for volunteer and staff activities.

- Establish a job description that is congruent with the school culture and that articulates the goals and scope of the position
- Initiate search process.

Goal: Establish a technological infrastructure that supports current needs to communicate, manage and fund raise and that is compatible with projected needs

- Research and identify current and projected development and financial management needs; compare and contrast with current systems in place.
- Implement recommendations regarding upgrading or changing alumni, development, and/or financial management systems.

6. Vision: As the school moves out of its founding phase, it is essential that the [illegible] grounded in the philosophy and character of the school.

Goal: To establish a process for determining the need and feasibility for a capital/endowment campaign to fund the recommendations of this Strategic Plan

- Conduct a feasibility study to determine campaign goals, priorities and needs
- Determine goal and timetable for campaign.

[illegible]

7. Vision: The Lake Country Land School is integral to the development [illegible]

Goal: To develop a five year strategic plan for the Lake Country Land School that integrates pedagogical and programmatic goals with financial feasibility

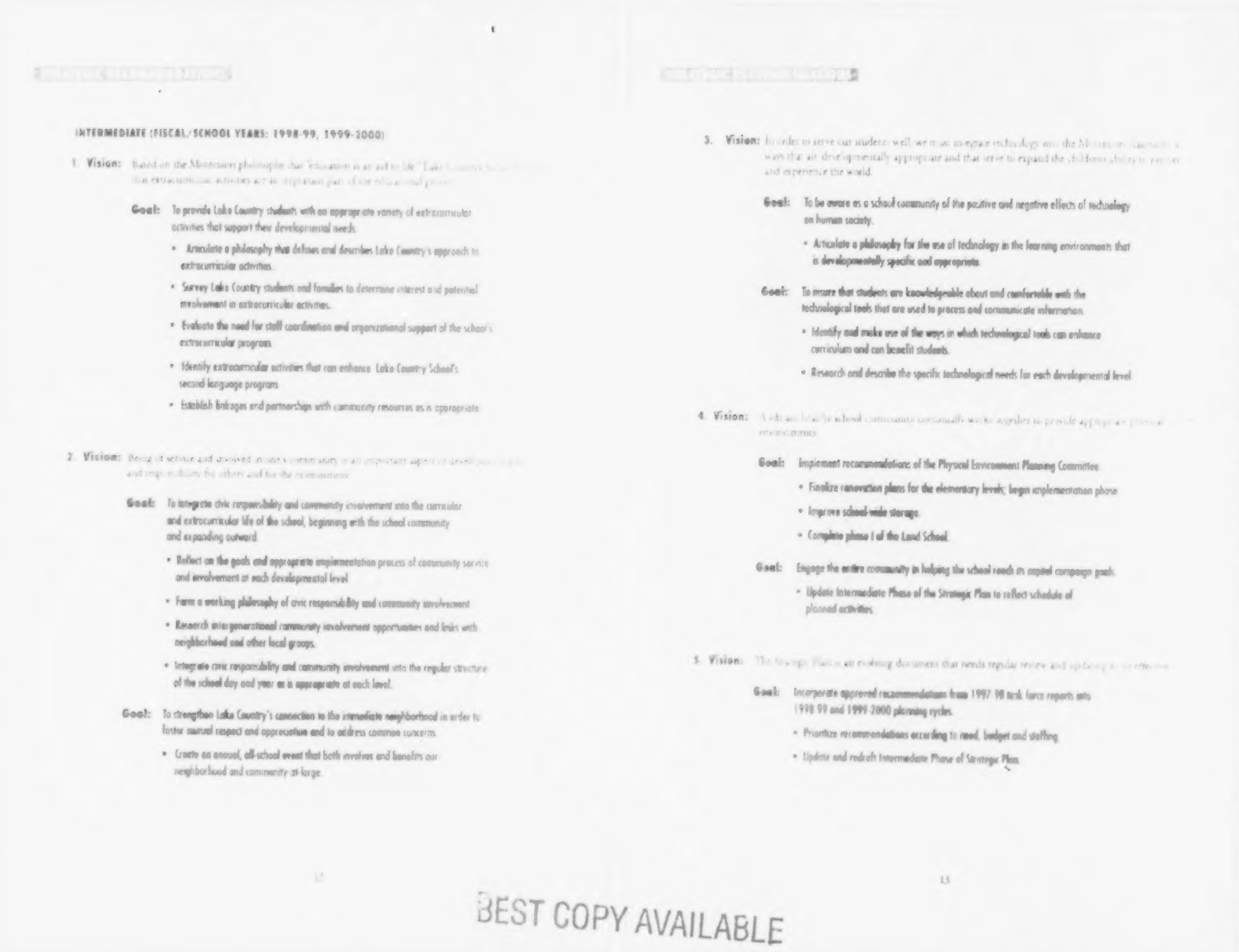
- Design a five year program development plan for the Lake Country Land School for all the levels of the school
- Develop a five year funding strategy for the Land School

8. Vision: Parents or guardians and teachers will be more effectively supported in forming [illegible] partnership to support the development of each child.

Goal: To improve mutual understanding and communication between parents or guardians and teachers.

- Diversify parent education and parent contact opportunities
- Evaluate and if necessary restructure both the conference procedure and the written evaluation form.
- Evaluate both the timing and procedures for standardized testing
- Enlist both staff and parents in an annual, mutual reinvestment in the principles of the school and the Montessori philosophy
- Develop a packet of educational materials that are presented to each new family
- Increase communication to parents regarding classroom projects and activities.

Long-Range Plan, Lake Country School (continued)



INTERMEDIATE (FISCAL/SCHOOL YEARS: 1998-99, 1999-2000)

1. **Vision:** Based on the Montessori philosophy that "education is an aid to life," Lake Country [illegible] that extracurricular activities are an important part of the educational process.

Goal: To provide Lake Country students with an appropriate variety of extracurricular activities that support their developmental needs.

- Articulate a philosophy that defines and describes Lake Country's approach to extracurricular activities.
- Survey Lake Country students and families to determine interest and potential involvement in extracurricular activities.
- Evaluate the need for staff coordination and organizational support of the school's extracurricular program.
- Identify extracurricular activities that can enhance Lake Country School's second language program.
- Establish linkages and partnerships with community resources as is appropriate.

2. **Vision:** Being of service and involved in one's community is an important aspect of developing [illegible] and responsibility for others and for the environment.

Goal: To integrate civic responsibility and community involvement into the curricular and extracurricular life of the school, beginning with the school community and expanding outward.

- Reflect on the goals and appropriate implementation process of community service and involvement at each developmental level.
- Form a working philosophy of civic responsibility and community involvement.
- Research intergenerational community involvement opportunities and links with neighborhood and other local groups.
- Integrate civic responsibility and community involvement into the regular structure of the school day and year as is appropriate at each level.

Goal: To strengthen Lake Country's connection to the immediate neighborhood in order to foster mutual respect and appreciation and to address common concerns.

- Create an annual, all-school event that both involves and benefits our neighborhood and community at-large.

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3. **Vision:** In order to serve our students well we must integrate technology into the Montessori classroom in ways that are developmentally appropriate and that serve to expand the children's ability to explore and experience the world.

Goal: To be aware as a school community of the positive and negative effects of technology on human society.

- Articulate a philosophy for the use of technology in the learning environments that is developmentally specific and appropriate.

Goal: To insure that students are knowledgeable about and comfortable with the technological tools that are used to process and communicate information.

- Identify and make use of the ways in which technological tools can enhance curriculum and can benefit students.
- Research and describe the specific technological needs for each developmental level.

4. **Vision:** A vibrant healthy school community continually works together to provide appropriate physical environments.

Goal: Implement recommendations of the Physical Environment Planning Committee.

- Finalize renovation plans for the elementary levels; begin implementation phase.
- Improve school-wide storage.
- Complete phase I of the Land School.

Goal: Engage the entire community in helping the school reach its capital campaign goals.

- Update Intermediate Phase of the Strategic Plan to reflect schedule of planned activities.

5. **Vision:** The Strategic Plan is an evolving document that needs regular review and updating to be effective.

Goal: Incorporate approved recommendations from 1997-98 task force reports into 1998-99 and 1999-2000 planning cycles.

- Prioritize recommendations according to need, budget and staffing.
- Update and redraft Intermediate Phase of Strategic Plan.

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Long-Range Plan, Lake Country School (continued)

STRATEGIC RECOMMENDATIONS

EXTENDED (FISCAL/SCHOOL YEARS: 2000-01, 2001-02)

1. Complete Lake Country Capital/Endowment Campaign.
2. Conduct a 25th Anniversary Celebration.
3. Incorporate previously approved recommendations into final two years of the Strategic Plan as well as updating plan based on any new planning variables.

LAKE COUNTRY SCHOOL

Strategic Plan Implementation Schedule

Long-Range Plan, Lake Country School (continued)

[illegible]

1. **Vision:** The protected, three hour work cycle is central to Montessori pedagogy and to the children's developmental needs.

Goal: Ensure that a three hour work cycle is possible for Lake Country Children's House and Elementary students.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Evaluate classroom schedules in light of earlier start time.	Level Coordinators Principal	[illegible]	Annual	[illegible]	Meeting Time
B. Improve the work flow of the students both in the classroom and with specialists.	Principal Staff Advisory	Underway	Annual	Ongoing	[illegible] Money

2. **Vision:** The structure and form of our toddler and extended day programs should be informed by the philosophy of the school and by the developmental needs of the children.

Goal: To create a program for our three- and four-year old children that is in concert developmentally with the Children's House programming.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Study and evaluate the concept of All Day Montessori.	CH Coordinator CH Staff	Underway	[illegible]	[illegible]	[illegible] Money
B. Continue to coordinate with the current Toddler program.	CH Coordinator & Staff Toddler Director & Staff	Underway	[illegible]	Ongoing	Support Money

Goal: To develop an extended day program that more adequately serves the needs of elementary children from three to six p.m.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Restructure the extended day program for the 1997-98 school year.	Extended Day Director Extended Day Staff Elementary Coordinator Principal	Underway	[illegible]	Ongoing	Support Money
B. Implement recommendations of the Extracurricular Task Force.	Director of Extended Day Extracurricular Committee Elementary Coordinator	Underway	[illegible]	Ongoing	Staff Support

IMMEDIATE (FISCAL/SCHOOL YEAR: 1997-98)

3. **Vision:** Beautiful, prepared environments are central to the work with the children in a Montessori school.

Goal: To renovate the elementary levels of the school including the specialist classrooms.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Obtain previous renovation plans and consult with staff and professional designers.	Building Committee Elementary Staff	September 1997	1/15/98	Spring 1998	Capital Money
B. Explore funding options: capital campaign vs. increased mortgages.	Finance Committee Development Committee Development Director	February 1997	6/15/97	Ongoing	

Goal: To improve acoustics in the gym.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Implement current recommendations of Building Committee.	Building Committee Board	Underway	[illegible]	[illegible]	[illegible]

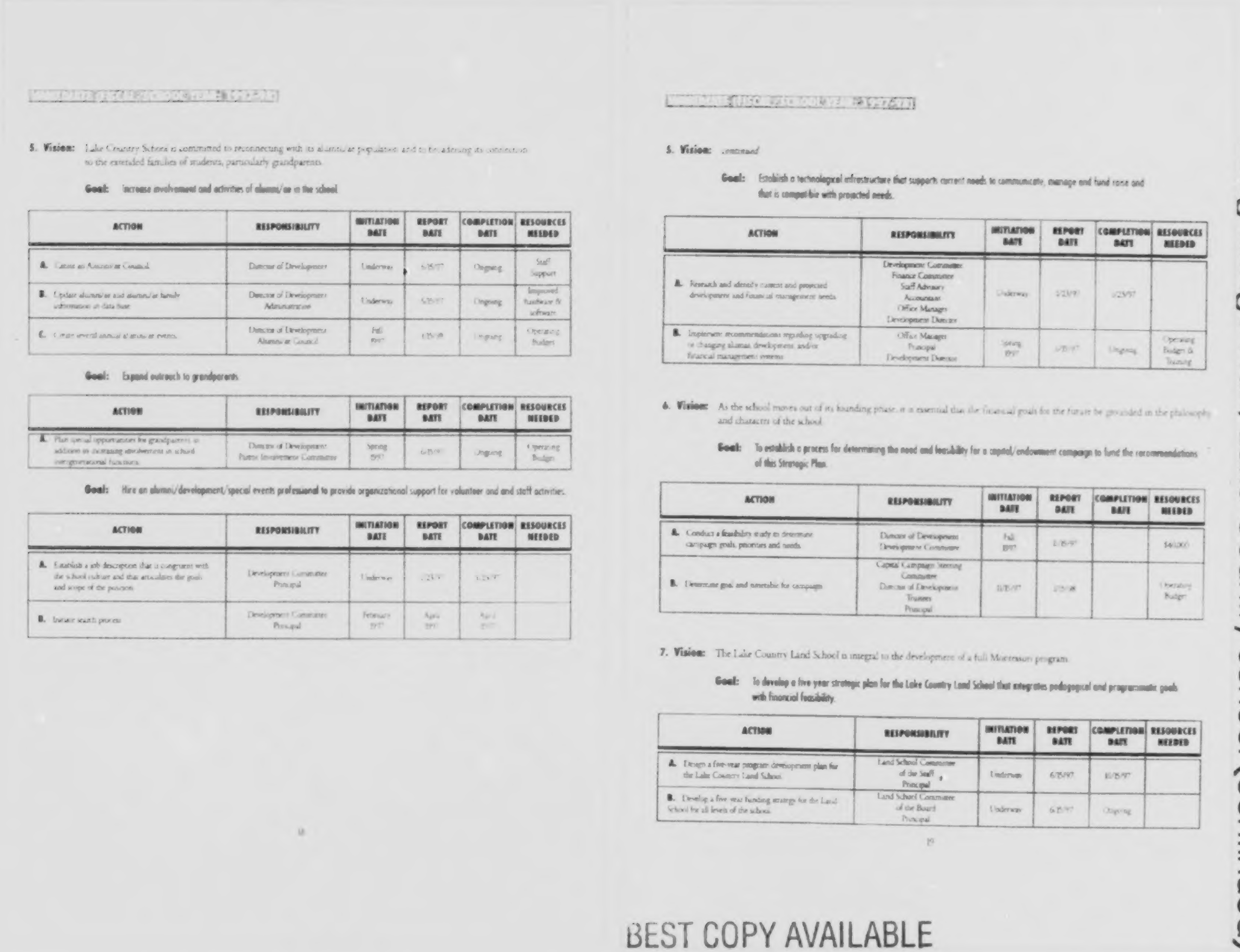
Goal: To improve assembly and performance space.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Explore creative options including shared space.	Building Committee Administration Principal	Underway	[illegible]	Ongoing	Support Money

4. **Vision:** Exposure to a second language is highly valued by the community for all the children of the school.

Goal: To evaluate and re-articulate the goals of the second language program.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Examine issues of fluency as a goal of the second language program.	ISACS Level Committee Level Coordinators French Teachers, Principal	Underway	[illegible]	Ongoing	[illegible]
B. Evaluate the expansion of Spanish as a club or program.	ISACS Level Committee Level Coordinators Principal	Underway	[illegible]	Ongoing	[illegible]



[illegible]

5. Vision: Lake Country School is committed to reconnecting with its alumni/ae population and to broadening its connection to the extended families of students, particularly grandparents.

Goal: Increase involvement and activities of alumni/ae in the school.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Create an Alumni/ae Council	Director of Development	Underway	6/15/97	Ongoing	Staff Support
B. Update alumni/ae and alumni/ae family information in data base	Director of Development Administration	Underway	5/15/97	Ongoing	Improved hardware & software
C. Create several annual alumni/ae events	Director of Development Alumni/ae Council	Fall 1997	1/15/98	Ongoing	Operating Budget

Goal: Expand outreach to grandparents.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Plan special opportunities for grandparents in addition to increasing involvement in school intergenerational functions	Director of Development Parent Involvement Committee	Spring 1997	6/15/97	Ongoing	Operating Budget

Goal: Hire an alumni/development/special events professional to provide organizational support for volunteer and and staff activities.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Establish a job description that is congruent with the school culture and that articulates the goals and scope of the position	Development Committee Principal	Underway	1/23/97	1/23/97	
B. Initiate search process	Development Committee Principal	February 1997	April 1997	April 1997	

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[illegible]

5. Vision: *continued*

Goal: Establish a technological infrastructure that supports current needs to communicate, manage and fund raise and that is compatible with projected needs.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Research and identify current and projected development and financial management needs	Development Committee Finance Committee Staff Advisory Accountant Office Manager Development Director	Underway	1/23/97	1/23/97	
B. Implement recommendations regarding upgrading or changing alumni, development and/or financial management systems	Office Manager Principal Development Director	Spring 1997	1/15/97	Ongoing	Operating Budget & Training

6. Vision: As the school moves out of its founding phase, it is essential that the financial goals for the future be grounded in the philosophy and character of the school.

Goal: To establish a process for determining the need and feasibility for a capital/endowment campaign to fund the recommendations of this Strategic Plan.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Conduct a feasibility study to determine campaign goals, priorities and needs	Director of Development Development Committee	Fall 1997	1/15/97		$40,000
B. Determine goal and timetable for campaign	Capital Campaign Steering Committee Director of Development Trustees Principal	11/15/97	2/15/98		Operating Budget

7. Vision: The Lake Country Land School is integral to the development of a full Montessori program.

Goal: To develop a five year strategic plan for the Lake Country Land School that integrates pedagogical and programmatic goals with financial feasibility.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Design a five-year program development plan for the Lake Country Land School	Land School Committee of the Staff Principal	Underway	6/15/97	10/15/97	
B. Develop a five year funding strategy for the Land School for all levels of the school	Land School Committee of the Board Principal	Underway	6/15/97	Ongoing	

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Long-Range Plan, Lake Country School (continued)

[illegible] (FISCAL/SCHOOL YEAR: 1997-98)

8. Vision: Parents or guardians and teachers will be more effectively supported in forming a true partnership to support the development of each child.

Goal: To improve mutual understanding and communication between parents or guardians and teachers.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Diversify parent education and parent contact opportunities.	Principal Level Coordinator Parent Education Committee	Underway	Annually	Ongoing	Operating Budget
B. Evaluate and, if necessary, restructure both the conference procedures and the written evaluation forms.	Level Coordinators Staff Advisory Committee Principal	Underway	Spring 1997	Spring 1997	
C. Evaluate both the timing and procedures for standardized testing.	Elementary Teachers Elementary & Junior High Coordinators	Spring 1997	Fall 1997	Winter 1997-1998	Staff Development Money
D. Enlist both staff and parents in an annual, mutual recommitment to the principles of the school and the Montessori philosophy.	Principal Parent Education & Staff Development Committees	Fall 1997	Annually	[illegible]	
E. Develop a packet of educational materials that are presented to each new family.	Admissions Director Level Coordinators Principal	Fall 1997	Annual Update	Ongoing	Operating Budget
F. Increase communication to parents regarding classroom projects and activities.	Classroom Teachers Parent Involvement Committee Room Parents Courier	Underway	[illegible]	Ongoing	

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INTERMEDIATE (FISCAL/SCHOOL YEAR: 1998-99—1999-2000)

1. Vision: Based on the Montessori philosophy that "education is an aid to life," Lake Country School believes that extracurricular activities are an important part of the educational process.

Goal: To provide Lake Country students with an appropriate variety of extracurricular activities that support their developmental needs.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Articulate a philosophy that defines and describes Lake Country's approach to extracurricular activities.	Extracurricular Task Force Extended Day Director Athletic Director Principal Level Coordinator	Fall 1998	Annual	January 1999	
B. Survey Lake Country students and families to determine interest and potential involvement in extracurricular activities.	Extracurricular Task Force	Fall 1998	December 1998	December 1998	
C. Evaluate the need for staff coordination and organizational support of the school's extracurricular program.	Extracurricular Task Force Principal	Fall 1998	December 1998	December 1998	Money
D. Identify extracurricular activities that can enhance Lake Country School's second language program.	Extracurricular Task Force Principal	Underway	Fall 1999	Ongoing	Staff Support Money
E. Establish linkages and partnerships with community resources as is appropriate.	Extracurricular Task Force	Underway	Annual	Ongoing	Staff Support Money

2. Vision: Being of service and involved in one's community is an important aspect of developing respect and responsibility for others and for the environment.

Goal: To integrate civic responsibility and community involvement into the curricular and extracurricular life of the school, beginning with the school community and expanding outward.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Reflect on the goals and appropriate implementation process of community service and involvement at each developmental level.	Staff Advisory Level Coordinators Civic Responsibility Task Force Special Events Coordinator	Fall 1998	December 1998	Ongoing	Staff Support Money
B. Form a working philosophy of civic responsibility and community involvement.	Staff Advisory Level Coordinators Civic Responsibility Task Force Special Events Coordinator	Fall 1998	December 1998	Ongoing	
C. Research intergenerational community involvement opportunities and links with neighborhood and other local groups.	Civic Responsibility Task Force Special Events Coordinator	January 1999	June 1999	Ongoing	Staff/Support Money
D. Integrate civic responsibility and community involvement into the regular structure of the school day and year as is appropriate at each level.	Civic Responsibility Task Force Level Coordinators Special Events Coordinator	Fall 1999	January 2000	Ongoing	Staff/Support Money

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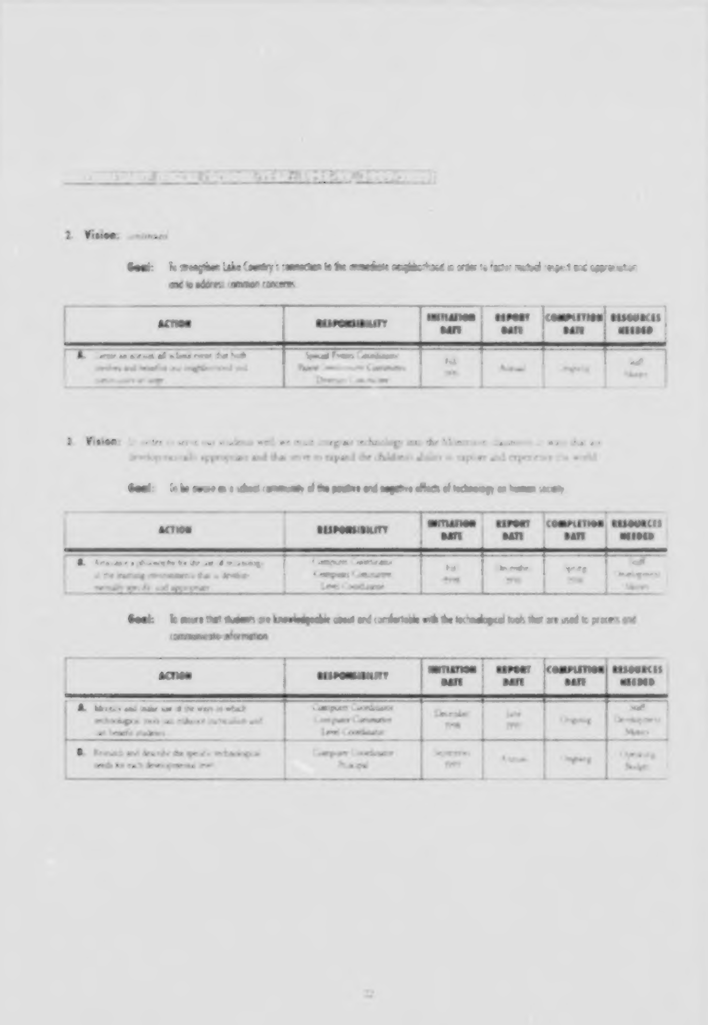

[illegible]

2. Vision: continued

Goal: To strengthen Lake Country's connection to the immediate neighborhood in order to foster mutual respect and appreciation and to address common concerns.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. [illegible]	Special Events Coordinator Parent Community Committee Diversity Coordinator	Fall 1998	Annual	Ongoing	Staff Hours

3. Vision: In order to serve our students well we must integrate technology into the Montessori classroom in ways that are developmentally appropriate and that serve to expand the children's ability to explore and experience the world.

Goal: To be aware as a school community of the positive and negative effects of technology on human society.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Articulate a philosophy for the use of technology in the learning environments that is developmentally specific and appropriate.	Computer Coordinator Computer Committee Level Coordinator	Fall 1998	December 1998	Spring 1999	Staff Development Hours

Goal: To ensure that students are knowledgeable about and comfortable with the technological tools that are used to process and communicate information.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Identify and make use of the ways in which technological tools can enhance curriculum and can benefit students.	Computer Coordinator Computer Committee Level Coordinator	December 1998	June 1999	Ongoing	Staff Development Hours
B. Research and describe the specific technological needs for each developmental level.	Computer Coordinator Principal	September 1997	Annual	Ongoing	Operating Budget

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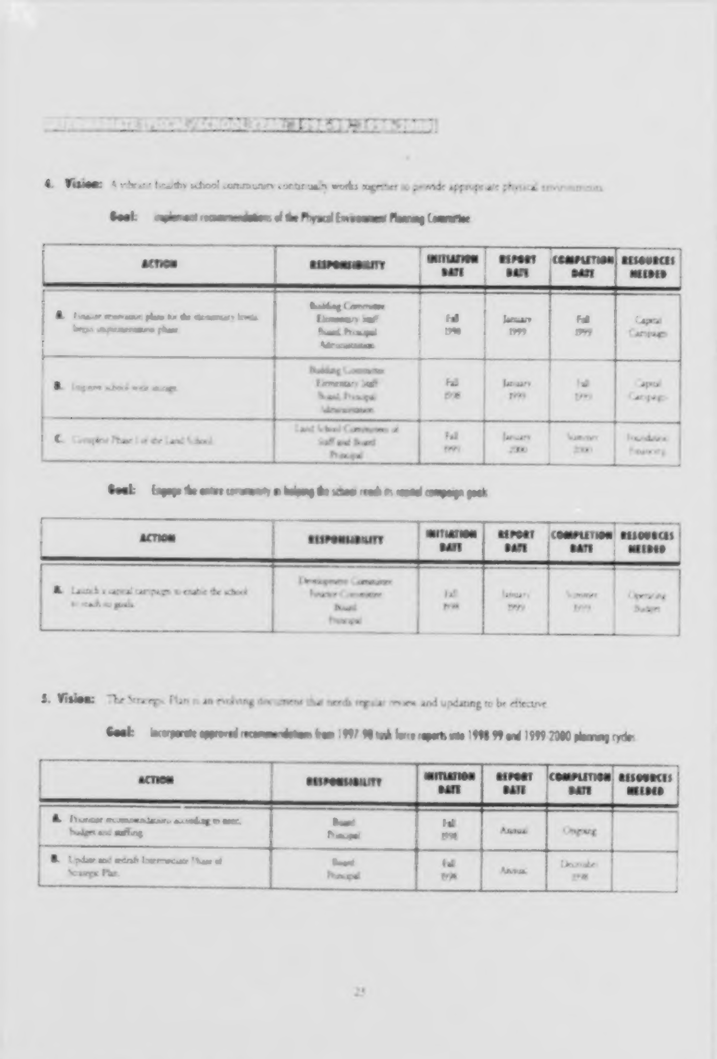

[illegible]

4. Vision: A vibrant healthy school community continually works together to provide appropriate physical environments.

Goal: Implement recommendations of the Physical Environment Planning Committee.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Finalize renovation plans for the elementary levels; begin implementation phase.	Building Committee Elementary Staff Board, Principal Administration	Fall 1998	January 1999	Fall 1999	Capital Campaign
B. Improve school-wide storage.	Building Committee Elementary Staff Board, Principal Administration	Fall 1998	January 1999	Fall 1999	Capital Campaign
C. Complete Phase I of the Land School.	Land School Committee of Staff and Board Principal	Fall 1999	January 2000	Summer 2000	Foundation Financing

Goal: Engage the entire community in helping the school reach its capital campaign goals.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Launch a capital campaign to enable the school to reach its goals.	Development Committee Finance Committee Board Principal	Fall 1998	January 1999	Summer 1999	Operating Budget

5. Vision: The Strategic Plan is an evolving document that needs regular review and updating to be effective.

Goal: Incorporate approved recommendations from 1997-98 task force reports into 1998-99 and 1999-2000 planning cycles.

ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Prioritize recommendations according to cost, budget and staffing.	Board Principal	Fall 1998	Annual	Ongoing	
B. Update and redraft Intermediate Phase of Strategic Plan.	Board Principal	Fall 1998	Annual	December 1998	

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ACTION	RESPONSIBILITY	INITIATION DATE	REPORT DATE	COMPLETION DATE	RESOURCES NEEDED
A. Complete Lake Country Capital Endowment Campaign	Board, Principal Director of Development Development Committee		Annual	Spring 2000	Operating Budget
B. Conduct a 25th Anniversary Celebration	Board Special Events Coordinator	Fall 1999		Spring 2000	Operating Budget
C. Update Strategic Plan prepare for new planning process	Board Principal	Fall [illegible]	Annual	Spring [illegible]	

LAKE COUNTRY SCHOOL
Physical Environment Planning Committee

(Kirsten Seterdahl, Dean Thomson, Doug Alecci, Terry Larkin, Pat deLeon, Kathy Coskran)

INTRODUCTION

The amount and type of physical space at LCS affects the amount and type of educational opportunities available for our children. Needed space for school music and theater productions decreases the amount of time that physical education can be taught in the gym. Needing to clean up art projects so the room can be used for another program limits the type of art projects that can undertaken. Often if one program expands its space, another suffers. Some but not all problems can be solved by creative scheduling and use of the space we have. LCS needs more space for its program needs.

More efficient or off-site storage could incrementally increase space. Major space and program needs can be solved by obtaining new space. Additional space for programs could be leased off-site, houses adjoining the school could be purchased (subject to zoning restrictions), and additions could be built onto or on top of the current building, on purchased adjoining land, or underneath the current parking lot or back playground.

Renovation of existing space is also needed throughout the school to provide additional program opportunities.

NEED	SOLUTION
ADMINISTRATION 1) Development Office 2) Admissions Office	1&2) Rent space from center for performance arts 1&2) Buy house on Pleasant Avenue (check zoning whether commercial or school use permitted) -- neighborhood issues
ART 1) Studio Space — dedicated space so projects can be left (batik, pottery ...)	1) New room on 2nd floor 1) If administration is moved, art could be transferred ... 1) Light structure for studio on roof

ATHLETICS	
1) Storage 2) Need more access to gym 3) Acoustics in gym 4) Challenge course at Land School 5) Locker room and showers	1) Vertical shelving under stairs 2) Explore what space can be scheduled at MLK park 2) Same: Risen Christ & Sebathene 2) Problem of limited access solved with new auditorium 3) Baffles and sound dampening
CHILDREN'S HOUSE	
1) Extend program for 3 - 4 year olds for all day 2) Create space for a toddler program -- transform basement level into young children level 3) Bathrooms in class may be required by code 4) Parents reception area 5) Electric outlets 6) Redesign cubbies for clothing and boots	1) Use current extended day space 2) Use current extended day 1&2) Rent space at CFPA for extended day 1&2) Floating areas for extended day for older children (cafeteria, library, new room on 2nd floor ...) 1&2) Use new auditorium space 4) Use part of current extended day space
SCHOOL COMMUNITY/OUT-REACH	
1) Space for meetings and gatherings -- space for weekly assemblies -- ability to provide meals 2) Vehicles	1) New auditorium or accoustically friendly gym 1) Expanded kitchen facility

Long-Range Plan, Lake Country School (continued)

EXTENDED DAY	
1) New space needed if CH program expanded	* 1) Multi-use current space for older children (Cafeteria [put shelves with doors for materials], new room on 2nd floor, library, classrooms) 7-9:30 a.m./4-6:00 p.m.
EI & II	
1) Water and sinks in rooms 2) More electrical outlets 3) New translucent windows with comparable energy efficient glass [Cal-wall] 4) Improve overcrowding of cloak room and cubbies 5) More in-class and general storage 6) Better and more open access to hallways 7) Larger and more usable countertops 8) Ergonomic computer stations	1-7) Obtain previous renovations plans
ENVIRONMENTAL CONCERNS	
1) Implement current landscaping project -- Outside plantings -- Transition space from front lot to back 2) Materials purchasing 3) Recycling policy -- Waste Management	1) Encourage donated trees and plants 4) Stairs down to and up from CH patio

FACILITIES	
1) Heat in bathrooms	1) Baseboard electric heat
2) Urinals to reduce cleaning	2) Replumbing
3) New windows are of poor quality and sashes break	3) Put wax and silicone on tracks -- possible replacement
4) Brown tile in EI hall and custom tile in EII needs replacing	
5) West exit doors removed and glassed in to create solarium	
6) Wire for phones in classes (voice mail)	New phone system
7) Renovate West staircase	

JUNIOR HIGH	
1) Storage	1) Above lockers and above head in back hall (code issues for later) 1) Shelving under stairs leading from JH to gym
2) Sara's room: light	2) Window between Sara and Chris's room or skylight
3) Sara's Room: intimate space	3) Loft
4) Stalls in showers	4) Build partitions

Long-Range Plan, Lake Country School (continued)

LAND SCHOOL	
Phase I	
1) CSA Working Farm a) house livable b) barn functional as shelter -- investigate structural capacity for loads and weather (need opinion from p.e.) c) septic capable for occasional student use near farm d) green house e) renovate out-buildings	I.1c) Concrete privies/composting privies -- environmentally responsible -- need schematic plan
Phase II	
1) Bathroom facilities/house which could be used by students and visitors near location of Phase II buildings	II.1-5) Land use study -- University of Minnesota II.1-5) Design Studio -- University of Minnesota
2) Cabins for sleeping	
3) Lodge a) teaching room b) kitchen	
4) Craft Center a) bee keeping b) maple sugaring	
5) Hostel -- cabins with center kitchen/meeting cabin or -- House	

Long-Range Plan, Lake Country School (continued)

THEATER/PERFORMING ARTS	
1) Auditorium 2) Music practice/lesson rooms	1) Explore sharing/leasing from Risen Christ in return for paying part of renovation 1) Explore Walker stage 1) Reprogram performances to use CFPA (change to smaller productions) 1) Build auditorium as 4th floor; new space under parking lot, or on adjoining land 2) Rent from CFPA
RESOURCE CENTER	
1) Space 2) Table for computer [Ask Ann Luce]	1) Put resources in shelves in halls
STORAGE	
1) Move current storage room on first floor to create new teaching space 2) School-wide inventory of storage needs	• Need school wide plan for storage 1) Reclaim janitor closets; then reclaim 1st floor storage room as space 1) Utilize crawl space above second floor 1) Utilize storage under stairs in gym 1) Off site storage for records 1) Space around boiler room

FOOD	
1) Environmental responsibility issues -- waste (paper plates) 2) Quality and type of food	1&2) Kitchen upgrade -- milk dispenser -- dishwasher -- if not used as a kitchen, use space otherwise -- curriculum opportunities (meal planning) 2) Cost/Benefit study on brought in food vs. prepared

PROPOSED PRIORITY

1) Ensure there is a yearly budget item to maintain current physical plant.

2) EI & II (and art room): install water and sinks and increase number of electric outlets

- will expand program opportunities
- approximate cost: $40,000 - $50,000

3) Improve school-wide storage

- if janitor closets are reclaimed as janitor closets by installing water in EI & EII, then we can reclaim all or a portion of main storage room on first floor as classroom
- need a school-wide inventory of storage needs and available space
- approximate cost: dependant on results of inventory

4) Obtain Auditorium space and storage for sets: approach Incarnation re: shared use in return for sharing cost of auditorium upgrade

- a cost/benefit tradeoff given amount of use a new auditorium would get and the cost of building new one
- approximate cost: dependant on discussions with Risen Christ

5) Improve gym acoustics

- to satisfy Jill's needs
- to lessen sound transmitted to J.H.
- to provide better performance space
- to provide assembly and meeting space

Long-Range Plan, Lake Country School (continued)

approximate cost: @ $5,200 for caulking and filling openings causing sound transmission from gym; @ $20,000 for wall mounted accoustic panels; @ $17,000 for ceiling baffles; @ $20,000 for suspended accoustic tiles over ceiling baffles; @ $18,000 for rubber mat and carpet in J.H. shop area

6) Renovate current extended day space for toddler and C.H.; move extended day to cafeteria or research center, or J.H. Commons.

- approximate cost: base cabinets $150-$200 per foot; upper cabinets $85-$105 per foot; code requirements and other design features presently unknown or undetermined.

7) Finish Phase I at Land School

- approximate cost: $10,000-$15,000

8) Purchase 30-50 passenger school bus or 2 more vans, alternatively, rent bus when needed

- approximate cost: undetermined

9) Make kitchen functional

- to serve hot lunch
- to enable it to be used by classes as part of their programs
- approximate cost: $5,500-$7,500 to upgrade space and finishes; equipment can range from $60-$100 per square foot or $225 to $400 per student

10) Replace windows in EI and EII

largely aesthetic, but a significant impact on the classroom environment
- approximate cost: $65,000-$75,000 for 38 windows to be replaced

11) Initiate Phase II of Land School

- approximate cost: undetermined

Needed Investigation:

1) Additional cost research
2) Approach neighbor about purchase or option to purchase his house
3) Approach Risen Christ about sharing use in return for upgrade
    -- theater
    -- storage
4) Check with Paul and Annette about what records could be moved
5) Inventory storage rooms and closets at LCS
6) Determine rents from CFPA for band and music lessons
7) Determine ownership of alley adjacent to LCS backlot

Addendum from the Playground Sub-Committee

Nancy Ma, Juliann McDermott, Binky Rockwell

Beginning in the spring of 1996 the committee began work on the landscape design for Lake Country's renovated parking lot, front and back playgrounds. In analyzing the needs of the various areas, it became apparent that a successful design would be one which not only softens the somewhat barren exterior, but which meets the educational and developmental needs of the children. In order to create more areas for play, the proposal includes the use of boulders and rocks in a "riverbed" area, a large cement and mosaic sculptural platform, a small wooden playhouse, a water sculpture, windsocks, flags, and a passage from the front yard to the back field.

Other issues include long term survival of the plants, as well as consideration of varieties of leaves, roots and stems, with a special emphasis on spring and fall varieties of flowers and fruits. It is suggested that the recommendations be implemented over a three-year time frame, with work on the first priorities beginning early in the spring of 1997.

1. **Underground sprinkler system:** Approximate cost: $5000.

Due to lack of adequate maintenance staff, the installation of an underground sprinkler system is critical to the long term survival of all planting.

2. **Tree planting:** Approximate cost: $400

Red and yellow dogwood to replace the dying bushes in the SW corner of the parking lot; fruit and flowering trees in the NW corner of the Pleasant Avenue playground; boulder bench with three evergreen trees on the SW corner of the Pleasant Avenue playground.

3. **Children's House garden:** Approximate cost:

Child-sized arbors over all entries with varieties of vines and a flagstone passage way (planted with creeping thyme) from the Pleasant Avenue playground to Pillsbury field.

4 **Pillsbury Avenue Field:** Approximate cost: $300

Three trees, plus ivy and honeysuckle vines to cover the fence and add shade, along with a changing display of flags and windsocks created by the children.

5. **Perennial border:** Approximate cost: Donated plants
Create a perennial border in the lawn area in front of the gym wall facing the parking lot.

6. **Pleasant Avenue Playground:** Approximate cost: $1000
Add a mosaic sculptured platform where the steps up to the school used to be (to provide play area for the children and a ceremonial space for the school). Plant two flowering pear trees to create an arbor over the side entry sidewalk.

7. **Long-range possibilities:**
Native trees and shade bed at the north side of the parking lot.

Extra-Curricular Programs Task Force
Sarah Endsley, Chair

Alfredo Barantes
Donna Blank
Tom Cravens
Leigh Hansen
Jackie Hayes
Tom Hedberg
Emmie Hester
Kathy McClure
Chris Nelson
Jill Olsen
Meg Sandifer
Joanne Sunquist

Situation Analysis:

Extracurricular activities are those activities sponsored, coordinated, or supported by the school that take place outside the usual school day. Based on the Montessori philosophy that "education is an aid to life," Lake Country School believes that extracurricular activities are an important part of the educational process for every child. Not only do these activities extend what the school is able to offer the children, but they also provide the children with a unique opportunity to pursue a passionate interest.

During the regular school day, we believe that it is imperative that we offer the world and the universe to the children; that every child experience art, music, language, mathematics, sports, science, history, foreign language and culture. Extracurricular activities give the children an additional opportunity to choose a focus: to play a musical instrument, to master chess, or to immerse themselves in Spanish or French culture. Activities sponsored by the school also serve to strengthen the community of children and adults and form an intergenerational gathering within the school.

The following extracurricular activities are currently available at Lake Country School, either before or after school:

Chess Club
Choir (E II)
Piano
Guitar lessons
Band, instruments and ensemble
Recorder, instrument and ensemble
Roots and Shoots (Environmental Club)
French Club (E II)
Spanish Club (Both E I & E II)
Cross Country Running (E I, E II, & JH)
Basketball (JH)
Soccer (JH)
Soccer Club (intramural–E II & JH)
Girl's Volleyball (JH)
Running Club (E I, E II, JH)
Swimming (E I) - *new Fall 96*
Weekend soccer clinic - *new Fall 96*

5/24/96

Long-Range Plan, Lake Country School (continued)

In the parent and student survey completed in preparation for the Strategic Planning process, a significant number of respondents indicated interest in more sports activities. Other types of extracurricular activities were mentioned less frequently. In the past we have also offered other sports and clubs including floor hockey, softball, and Eco-Rainforest Environmental Club. These activities usually disbanded because of the lack of staffing rather than loss of student interest.

The emerging vision of the Extracurricular Task Force expands the concept of extracurricular activities to include the arts (in addition to music), community service, and activities linked to Lake Country but not necessarily occurring at the school. The Task Force also recognizes the need for an articulated philosophy informing the extracurricular activities offered by the school that would be a result of research and discussion around the value of structured time vs. unstructured time and what that balance should be for children. A significant increase in Extracurricular Activities would also require the addition paid staff time.

Extracurricular Task Force Recommendations

1. **VISION:** Lake Country School will have an articulated philosophy informing extracurricular activities and will publish a yearly calendar or brochure coordinating current activities, based on the needs and interests of the children.

Objective 1: To survey Lake Country students and parents to find out what needs aren't currently being met and to get a sense of the possibility of parent involvement.

Implementation: Create and administer a survey.
Responsibility: Extracurricular Committee (new--parents & staff)
Initiation: Immediate
Completion: Spring 1997

Objective 2: Review the extensive list of ideas and strategies created by the Extracurricular Task Force with groups of children, staff, and parents.

Implementation: Formulate a mission and criteria for extracurricular activities at Lake Country School.
Responsibility: Extracurricular Committee (new--parents & staff)
Initiation: January 1997
Completion: Spring 1997

Objective 3: Some portion of a paid staff person's time should be dedicated to the coordination and support of Extracurricular Activities.

Implementation: Create a job description and estimate staff time needed.
Responsibility: Extracurricular Committee and Principal
Initiation: November 1996
Completion: January 1997

2. **VISION. Community Service:** Montessori recognized the importance of being of service for children and, within the Lake Country School community, the value of respect for others and for the environment is honored. This model of linking students for mutual support and growth can be deepened and expanded, both within the school, in the immediate neighborhood, and in the larger community of city, state, nation, and world.

Objective 1: Define what we mean by community service.

Implementation: The educational aspect of the definition process with the children, the raising of awareness that leads to effective action, would be the primary goal. Once agreement on values and key issues is achieved, *community* and *neighborhood* should be defined.
Responsibility: Community Service Committee of staff, parents, administration, students, alums(?)
Initiation January 1997
Completion June 1998

9/24/96

Objective 2: Provide community service opportunities that are developmentally appropriate for Lake Country students that link them with other neighborhood and community groups. Additionally, provide community service opportunities for Lake Country families.

Implementation: Research and discuss what kinds of community service activities are appropriate for each developmental level in the school as well as research activities that can be intergenerational.

Responsibility:	Committee Service Committee
Initiation	Fall 1998
Completion	Spring 1999

3. **VISION:** That Lake Country school will expand its offerings of extracurricular activities to include programs and events offered by other neighborhood groups. The reach of extracurricular activities can be increased without straining current Lake Country staff.

Objective: To explore opportunities for linkage with community organizations such as the Blaisdell YMCA, Martin Luther King tennis facility, the Center for the Performing Arts, and Sabathani Community Center.

Implementation: Research the activities of neighborhood and community groups and catalog their interest in having our students and families participate. Explore opportunities for our school to be a site for community-based service activities.

Responsibility:	Community Service Committee
Initiation	Fall 1997
Completion	Spring 1998

4. **VISION:** That extracurricular activities at Lake Country School will have an intergenerational component and include musical evenings, literary readings, and book discussions, as well as sports events, that are appealing to all members of the family.

Objective 1: To provide a place for families to play and learn together.

Implementation: Research the availability of space and initiate pilot evenings.

Responsibility:	Extracurricular Committee
Initiation	Fall 1999
Completion	Spring 2000

9/24/96

LAKE COUNTRY SCHOOL PROPOSED: ENVIRONMENTAL POLICY STATEMENT

The students and staff of Lake Country School are committed to achieving the following environmental policy goals:

In the Cafeteria/Kitchen

1. To explore the possibility of purchasing an institutional size dishwasher for the kitchen.

2. To work towards the reduction and eventual elimination of plastic and Styrofoam products.

3. To examine the possibility of recycling milk cartons or if a dishwasher is purchased to examine the possibility of purchasing a milk machine.

4. To use environmentally healthy cleaning products on tables, counters, and sink areas.

5. To improve the effort to recycle bottles (plastic and glass) and cans in the cafeteria.

6. To recycle aluminum foil in the kitchen.

7. To explore the possibility of serving healthier, higher quality food.

8. To promote the use of reusable lunch bags instead of paper and the use of reusable containers instead of plastic bags.

9. To work towards reducing the use of paper napkins and paper towels.

In the Office

1. To work towards using recycled paper products whenever possible.

2. To word towards reusing paper whenever possible.

3. To examine the production of the Tuesday Memo and explore alternatives.

4. To do number 3 in regards to all the publications of the school.

5. To work towards purchasing a set of staff dishes, silverware, cups and cloth napkins.

6. To examine the possibility of regulating student and staff copier use.

Long-Range Plan, Lake Country School (continued)

General Maintenance

1. To work towards using environmentally safe cleaning and maintenance products whenever possible.

2. To work towards disposing of all waste generated by the school in environmentally appropriate ways.

3. To work towards using energy saving products whenever possible.

4. To work towards conserving energy whenever possible.

5. To work towards using recycled and post-consumer recycled paper products whenever possible.

6. To work towards the elimination of plastic garbage bags in the smaller trash cans of the school.

7. To work towards developing a rechargeable battery system for the school.

8. To continue to work towards expanding the school's recycling program.

In the Classroom

1. For each classroom to develop an energy conservation plan for their room.

2. For each classroom to work on a comprehensive plan to reduce, reuse, and recycle paper effectively in their classroom.

3. To work towards using environmentally safe cleaning products in the classroom.

4. To work towards using environmentally safe pens, markers, glues, paints, etc. in the classroom.

5. To provide a way to recycle batteries in the classroom.

6. To provide a way to recycle plastic bags in the classroom.

7. To work towards the use of recyclable (cardboard) presentation boards only in the classroom.

8. To promote the growing of plants in all classroom environments.

In the Outdoor Environment of the School

1. To promote the organized growing of plants by all levels of the school.

2. To promote a no littering standard for the school.

3. To work towards an everyday clean-up of the schools outdoor environment.

During Staff and Parent Functions

1. To work towards the reduction and eventual elimination of plastic and Styrofoam products.

2. To provide obvious recycling opportunities for bottles and cans.

3. To word on reducing, reusing, and recycling paper products whenever possible during these functions.

4. To work toward purchasing a set of staff dishes, silverware, cups and cloth napkins for staff functions.

5. To purchase a set of cloth tablecloths which can be used at all staff and parent functions.

Long-Range Plan Summary, Montessori School of Raleigh (Raleigh, NC)

From Vision to Reality:

A Long Range Plan for the Montessori School of Raleigh

1995-2005

Prepared by the Long Range Planning Steering Committee with the advice and consultation of Independent School Management (ISM).

Unanimously approved by the Board of Directors

From Vision to Reality... A Conclusion

The Long Range Plan represents a bold commitment to advance the Montessori School of Raleigh to the highest levels of regional and national excellence of service.

That excellence will be held in trust for these children and, equally, for their yet unborn classmates of the future, by this and succeeding generations of the Montessori School of Raleigh Trustees.

Facilities and Equipment

Phase I: *1995 - 1996*

Phase II: *1996 - 1997*

Phase III: *1997 - 1999*

Phase IV: *1999 - 2005*

External Affairs and Institutional Advancement

Phase I-IV: *1995 - 2005*

Phase II: *1996 - 1997*

Phase III: *1997 - 1999*

Phase IV: *1999 - 2005*

Management, Finance, and Governance

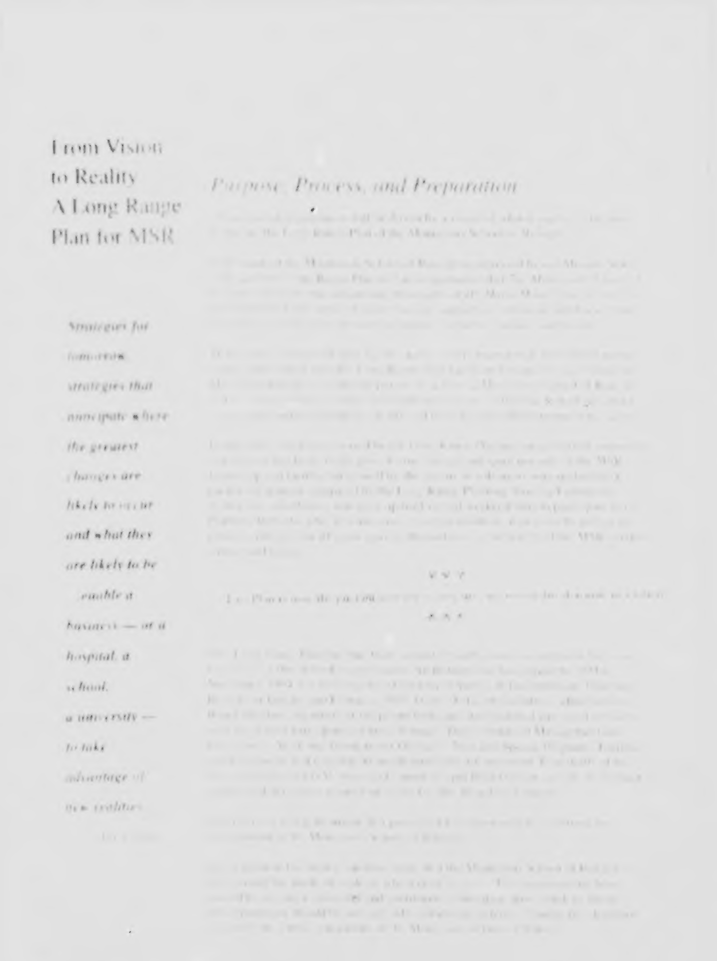
Phase I: *1995 - 1996*

Phase II: *1996 - 1997*

Phase III: *1997 - 1999* and Phase IV: *1999 - 2005*

This summary is written for parents and as part of the school's promotional materials. This Long-Range Plan covered a ten-year period, but, remarkably, all its goals were achieved in four years.

Long-Range Plan Summary, Montessori School of Raleigh (continued)



From Vision
to Reality
A Long Range
Plan for MSR

Purpose, Process, and Preparation

[illegible]

Strategies for tomorrow, strategies that anticipate where the greatest changes are likely to occur and what they are likely to be enable a business — or a hospital, a school, a university — to take advantage of new realities.

* * *

[illegible]

* * *

[illegible]

From Vision
to Reality
A Planning
Agenda &
Timetable

Academic and Instructional Programs

Phase I: 1995 - 1996

[illegible]

Phase II: 1996 - 1997

[illegible]

Phase III: 1997 - 1998

[illegible]

Phase IV: 1999-2001

[illegible]

New and Special Programs

Phase I: 1995 - 1996

[illegible]

Phase II: 1996 - 1997

[illegible]

Phase III: 1997 - 1998

[illegible]

Phase IV: 1999 - 2001

[illegible]

T[illegible]

B[illegible]

T[illegible]

Endowment Campaign, The Montessori School (Wilton, CT)

The Montessori School
Endowment Campaign

I pledge a total gift of ______ *to The Montessori School for the purpose of Endowment. My pledge will be paid in full by* ______ *, and will be divided into the following payment installment:*

☐ *My pledge represents a cash donation*
☐ *My pledge represents a gift of security*
☐ *My pledge represents a planned gift*

Signed: *Date:*
Accepted by:
Solicited by:

This pledge card and question-and-answer sheet introduce the rationale and uses for an endowment fund.

Endowment Campaign, The Montessori School (continued)

In an effort to explain some of the many questions surrounding the building of an endowment fund at The Montessori School, we have prepared the following Q&A.

Do we currently have an Endowment Fund? How large is it? What is the source of funds?

Yes. The Montessori School currently maintains a small endowment fund which, over the course of time, has accumulated to its present $170,000. Our present endowment is thanks in great part to Montessori families and friends, many of whom have never been solicited specifically for endowment, but who believe nonetheless, that an endowment is a necessary component of a financially sound school and have earmarked dollars above and beyond annual contributions in this way.

As parents, we hear so much about Annual Giving, New Moon Ball and the Marcovicci Concert bridging the gap in our operating budget between tuition revenue and expenses. If this gap is being successfully bridged, why do we need to add one more source of income?

Our school does currently bridge the gap between tuition revenue and operating expense exclusively through our Annual Giving and two other major fund-raisers and historically has been tremendously successful both financially as well as in terms of participation. Fiscal prudence, however, requires that we look to the future when this may not always be the case, especially during times of less robust economic conditions. While as a community we continue to commit to moderate tuitions, the gap between this revenue and expense continues to widen.

An endowment will lessen our school's exclusive dependence on tuition increases and annual fund raising events to bridge our operating gap by providing a reliable source of income year in and year out. It will provide our school with the flexibility to pursue its mission regardless of economic conditions.

If the gap between tuition revenue and operating expenses becomes so large, why don't we simply raise tuition?

Our Montessori School makes a deliberate, philosophical commitment to keep tuition rates as low as possible and to provide a tuition assistance program at 10% of our gross tuition revenue to encourage as diverse a community as possible. Offering the finest in Montessori education to as many as possible at an affordable rate has always been our school's mission. (By comparison with other Fairchester private schools and Montessori schools of a similar size and in the same geographic region, we are very successful in this endeavor.) Raising tuition and therefore excluding a significant portion of families who would like to attend is not consistent with who we are and what we are all about. We have always maintained that it takes more than writing a tuition check to live meaningfully in this community.

How does an economically diverse school benefit my child?

Our Montessori School is rich in cultural diversity. Over 20 distinct ethnic groups are represented by our families and this diversity adds a tremendous amount to the learning environment and to the Montessori community as a whole. Economic diversity is achieved through our tuition assistance program. Dr. Montessori called her approach to learning Education for Peace. She saw the true work of education as establishing a lasting peace. As we seek to instill in our children a sense of what it means to be a "citizen of the world", to give them a global view and to make them aware in a loving, nurturing environment, what it means to work together as a community, this diverse aspect of our community is of paramount importance.

How are expenses controlled at The Montessori School?

Our success thus far in controlling operating expenses is very clear. We are substantially below other schools in this area while at the same time offering a superior academic program and salaries that are above average. We achieve such a degree of low operating expense in large part due to the effort of our entire community. When families gather to work at Clean-Up days, volunteer to repair and maintain classroom material, volunteer their time and dollars toward the success of our many educational programs and social activities, we are all actively contributing to the financial health of our school. During our accreditation by the Connecticut Association of Independent Schools, The Montessori School was consistently praised for control of expenses.

I understand that the proceeds of Annual Giving, New Moon Ball and the Marcovicci Concert go into the operating budget. How will endowment dollars be handled?

The proceeds of Annual Giving, New Moon Ball and the Marcovicci Concert are used to support the current operating budget. During years when revenue from these fund raisers exceeds the total fundraising goal for the fiscal year, 100% of the excess funds will be directed to the endowment fund, subject to Board approval. This action further underscores the commitment of our school to building our endowment fund.

With regard to the endowment itself, by definition, endowment is intended to exist in perpetuity: This means endowment principal is never touched as this money represents the school's "nest egg". A portion of the investment return from this principal is contributed to the annual operating budget. In the case of The Montessori School, investment return will be re-invested until the time we reach our desired amount of principal ($1 million). Once the goal has been achieved, the endowment will be managed in such a way so that a small portion of the endowment's total investment return (5% of total market value or less) is contributed to the operating budget every year.

What are the planned provisions for investment and spending from endowment?

The investment of the endowment fund is overseen by an Investment Committee, a subcommittee of the Finance Committee of the Board of Trustees. With regard to spending, Endowment principal is never touched and only a portion of the total investment return (5% of total market value or less) will be contributed to the annual operating budget. Both the investment and spending policies for endowment are compatible with and support the overall mission of the school.

In managing the endowment, the Board of Trustees seeks to maintain "generational neutrality". In other words, the objective of the endowment is to provide at least the same level of support to future generations of students as the current students receive. The implications of this objective are:

- an annual transfer from endowment to the operating budget;
- this annual transfer, or spending, must keep pace with inflation;
- the principal or corpus of the endowment must also keep pace with inflation.

We've always thought of endowment as being the long-term funds that "preserve the school" in perpetuity. We love the school and want to assure that the good work it does exists for future generations. However, our primary concern is for the quality experience our child is having here now. How does an endowment benefit the present?

- Our goal in managing the endowment fund is to maintain generational neutrality and thereby ensure that both current and future generations of students benefit equally from endowment.
- To translate this into dollars and cents, once endowment reaches $1,000,000, we will make an annual transfer from the endowment to the operating budget of $50,000.
- An endowment will strengthen our school's balance sheet by helping build equity and creating a capital structure attractive to commercial lenders so that reasonable debt financing can be secured when necessary. This benefits our children immediately.
- An endowment is ultimately one of the most reliable sources of income for a school, year in and year out. It provides a school with operating flexibility so that it can exercise its own judgment about academic and other mission-critical priorities. In contrast, schools that lack endowments may be more likely to elevate economic considerations above mission-critical issues.
- The annual Fairchester Survey compares our school's endowment to those of other schools in our area. Ours is among the lowest per student ratio. A number of these institutions are of course much older than our own school, and thus have much larger endowments. Nonetheless, the accreditation report for our school prepared by the Connecticut Association of Independent Schools (CAIS) recommends the "...need for such funds to protect the future of the school."

One million dollars is a lot of money to raise. Why do we need so much?

Our long term goal is for endowment to support up to 10% of our operating budget. However, we can only achieve this in steps. In order to preserve the endowment in perpetuity, endowed institutions generally spend a small fraction of total investment return annually. Experts advise that this fraction be 5% or less of total market value.

Assuming that we have a $1,000,000 endowment by 2001, this 5% spending rate translates to a $50,000 transfer, or 2.6% of our projected $1.9 million operating budget, for that year. Prudently invested, it is our expectation that the endowment will grow over time to support an increasingly larger potion of our budget.

We agree that a healthy endowment is important to our school. However, it puts the burden on current families who have already given so much on top of the tuition we pay. What are the plans for involving future families in the growth of this fund?

The process of building an endowment fund is a long-term process, and we must begin somewhere. Remember that our current families enjoy the benefits of the hard work and sacrifice made by families who were at The Montessori School before us as well as the work of a fiscally responsible administration that has kept tuition moderate compared to other independent schools.

It will take time to build an endowment fund that will meet our goal of supporting up to 10% of the operating budget. Consistent with our philosophy of shared responsibility, future families will be very much involved in this building process.

Other than current Montessori School families, are there others who will be invited to participate in this endowment campaign?

We plan to invite alumni, grandparents, friends and foundations to participate. We welcome suggestions of prospective sources of funds.

Are there other plans for raising endowment dollars other than the direct solicitations of Montessori families?

Yes! Endowment by definition is a long-term, deliberate accumulation of funds to benefit the school in perpetuity. Therefore, in addition to outright financial donations to Endowment made by Montessori families and friends, several other components will contribute to the build up of endowment dollars.

- During periods when proceeds from our three fund-raisers exceed the total fundraising goal for the fiscal year, the Board of Trustees has voted to contribute 100% of the excess funds to endowment (subject to an annual Board of Trustees vote). This action further underscores the commitment of our school to building our endowment fund.

- We invite all Montessori families, alumni, grandparents and friends to purchase an engraved labyrinth brick to commemorate an event, person or memory associated with their relationship to the school. Proceeds will go to the endowment fund. This is a long-term project as there are a total of 948 bricks in our labyrinth.

- A bond of $500 is required for each child new to the school payable at the time of admission (no bond is required of families participating in our Tuition Assistance Program). These funds are held in an interest-bearing account, and the investment earnings are committed to endowment. When the child leaves the school, the family has the option of a refund of principal or donating it to the endowment fund.

While these measures all contribute to building our endowment fund, they will not contribute enough, alone, to enable us to reach our goal quickly enough. This is why we are counting on Montessori families and friends to help us reach our million dollar goal.

We don't really have a lot of money. We give as generously as we can to Annual Giving and support the New Moon Ball and Marcovicci with donations of money and time. We volunteer a lot and believe in the school's mission but can't imagine giving an even larger sum to endowment.

Gifts can be in the form of pledges paid over a three-year period. There are many other ways to give other than cash, as outlined below:

GIFTS OF CASH Most gifts to The Montessori School are cash contributions, made by personal check, VISA or MASTERCARD for which donors may receive tax benefits if they itemize deductions.

PLEDGES Pledges to the campaign may be paid over three years.

SECURITIES Many donors realize substantial tax advantages by transferring gifts of appreciated stock to the School. Capital gains on the amount of appreciation are avoided, and the donor receives a tax deduction for the stock's full market value. Once they are transferred to the School, stocks will be sold.

MATCHING GIFTS If your employer sponsors such a program you could double or even triple the size of your gift.

PLANNED GIFTS Several options, including bequests, trusts and pooled income funds, often expressed as a percentage of an estate, provide for the school's future in a meaningful way. Each has specific advantages and requirements.

OTHERS In addition to the ways outlined above, we invite families to contribute to Endowment in a variety of ways: through the engraved labyrinth bricks, the entering student bonds, and participating in the success of our three major fund-raisers the overages from which will go toward endowment.

A gift to endowment is a gift of perpetuity

Special Concerns of the Public School

Montessori in the public sector is a dynamic player in educational reform; it is Montessori's connection to the mainstream of education in North America. NAMTA acknowledges the success of public Montessori as well as the unique conditions that district and state-supported (including charter) Montessori schools must overcome and endure. This chapter is a bird's-eye view of the history and present direction of public-sector Montessori. The partnership between private and public Montessori is essential not only to the quality of Montessori for all children, but to the very moral and social character of the Montessori movement as a whole.

Chapter 16. Montessori in the Public School 607

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Montessori in the Public School

The History of Public Montessori

Public-sector Montessori has reflected Montessori's private-sector development since the early 1960s. Apart from the altruistic vision that Montessori should be accessible to all children, public Montessori represents the mainstreaming of Montessori, and therefore its history is important to all Montessori development. From a strategic point of view, public Montessori gives private Montessori increased visibility by raising the relevance of Montessori within the community at large. When public Montessori is initiated in a town, private Montessori enrollments usually improve.

Public and private Montessori schools have overlapping needs: good training, sustained supervision, careful upkeep of environments, thorough planning of teacher professional development. If private Montessori remains apart from public Montessori, there is little or no culture to support Montessori in the public school. Because tax-supported Montessori schools are often eligible for federal or state grants, the private sector's support of public Montessori education can mean new resources for private schools as well as for local Montessori teacher training centers. But far more important is the fact that private Montessori schools cannot find cosmic purpose in simply serving wealthy suburban children. Montessori must connect to a diverse society in order find meaning that comes from helping others and thereby raising its moral vision and purpose from its pioneering beginning to its future within educational reform.

Montessori Head Start: 1960s

Montessori in the United States began in the private sector, generating approximately fifty schools annually between 1960 and 1970. Small, private, experimental schools emerged in the early 1970s, sustained by a handful of teachers and parents "working around the clock for sub-standard wages trying to run a school on a shoestring."[1]

Integral to Montessori's revival in the 1960s was America's focus on early childhood education in connection with the founding of the federal Head Start program in the context of President Johnson's "War on Poverty." J. McVicker Hunt, a key developer of early childhood education for low-income families, acknowledges the Montessori educational alternative:

> (Many children from low-income families) come to the first grade, and even to kindergarten, unprepared to profit from regular school experience. ... We must try to help these children overcome their handicap by enriching their experience during their preschool years. Montessori has provided a model.[2]

The Montessori instructional model has been used as one option by Head Start since 1965. The federal Head Start program includes seven components aimed at aiding the development of the whole child: education, health, mental health, disabilities, nutrition, social services, and parent involvement. Using Montessori as the educational component helps Head Start meet its educational and parent involvement goals comprehensively. Today, public Montessori schools that wish to include three- and four-year-olds while charging minimal tuition may be eligible for significant monies through a Head Start funding blend that may include federal monies, desegregation funds, foundation and private gifts, and charter school funding.

Magnet Schools and Montessori as Alternative Education: 1970s to 1990s

The formative period for Montessori as an "alternative" school coincided with the formative period of federal court-ordered desegregation plans for America's urban centers during the 1970s. Desegregation planners looked for methods that would *attract* both minority and majority children to desegregation schools–hence the "magnet" school, whose numbers increased exponentially during the 1970s and included many Montessori magnets. By offering specialized and unique curricula like Montessori, it was hoped that magnet schools would be successful in bringing together students of all races and economic levels on a voluntary basis.

Magnet schools strove to offer unique options for children and teachers of specific talents or interests: foreign language, the arts, etc. In addition, instructional style became a matter of

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[1] Fantini, Mario D. "History and Philosophy of Alternative Schools." *Magnet Schools: Legal and Practical Implications*. Ed. Nolan Estes & Donald R. Waldrip. Dallas, TX: New Century Education Corporation, 1972.

[2] Hunt, J. McVicker. "Introduction: Revisiting Montessori." *The Montessori Method*. Maria Montessori. New York: Schocken, 1964.

focus for some magnet schools, which offered choices based on pedagogical schools of thought, usually ranging from a fundamental, structured curriculum to a flexible, experimental curriculum. Thus, through magnets, public schools tapped into the educational reform movement, with its variety of educational designs.

There has been an astounding amount of Montessori magnet school activity, with a current count of more than 200 Montessori schools in just over 100 districts–a 400% increase from 1988 to 1998.

Magnets Lose Desegregation Roots: Mid-1990s

Cities across the land have been ending their court-ordered desegregation since 1995, when *Missouri v. Jenkins* overturned a desegregation plan in Kansas City to import suburban children in order to integrate the school system. The pendulum swing suggests a vulnerable position for Montessori magnet schools due to the gradual elimination of desegregation busing plans, which made up a part of their initial rationale. Already the disruptive effects have been felt in Kansas City's three Montessori magnet schools, which have reverted to neighborhood schools and thus lost some of their children with Montessori background as they are forced to enroll non-Montessori children. Likewise, Denver's Mitchell Montessori School has been moved across town, renamed Denison Montessori School, and converted from a magnet to a neighborhood school, with a corresponding loss of Montessori-prepared children.

It is important to note, however, that both Denison and the schools in Kansas City are still holding their own due to the leadership of staff and parents who organized to retain their original students, either by driving their own children or by convincing the district to provide transportation.

Charter Schools and the Montessori Educational Alternative: 1992 to the Present

As of September 30, 1997, 29 states and the District of Columbia had charter school laws. Check with your state board of education for up-to-date information on charter school legislation in your state.

As magnet schools begin to lose their desegregation role in American education, charter schools are emerging as public schools with new purpose. What makes a charter school unique is that it contracts with a state or local agency, which provides it with public funds for a specified time period as an *independent* institution free of local school district control. A 1998 U.S. Department of Education report cites approximately 700 charter schools in 23 states and the District of Columbia, with only 19 charter schools having ceased operation.[1] Since they first began to emerge in 1992, Montessori charter

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[1] Office of Educational Research and Improvement, U.S. Department of Education. *A National Study of Charter Schools, 1998: Executive Summary*. July, 1998. U.S. Department of Education Home Page. May 18, 1999. <http://ed.gov/pubs/charter98/execsum.html>.

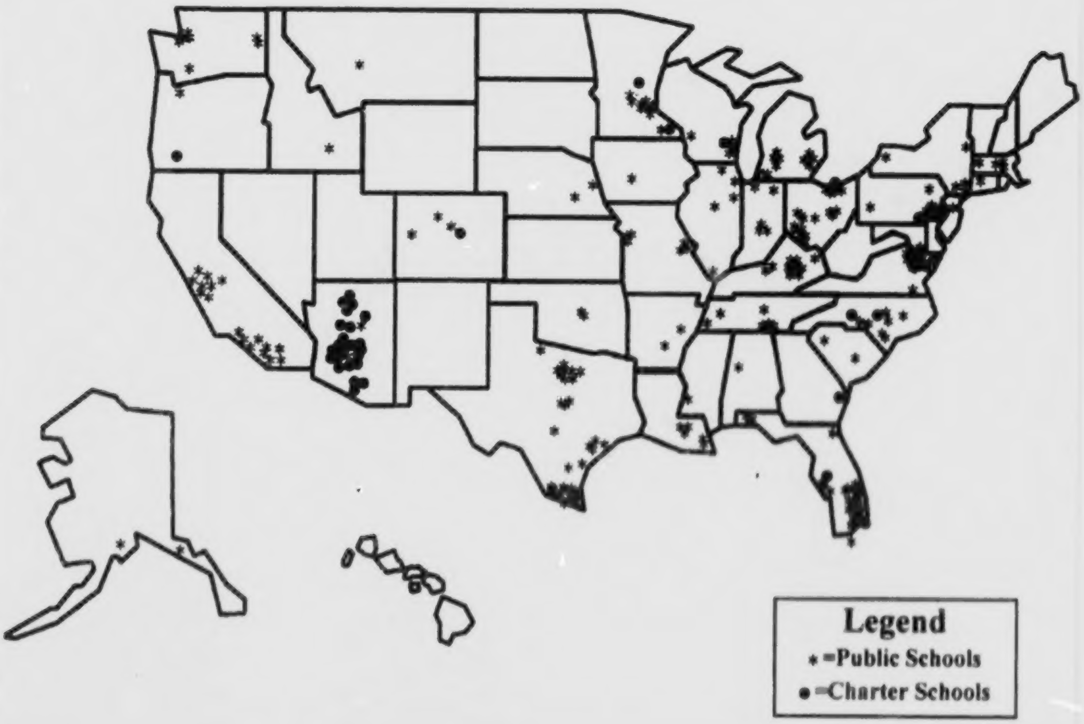

Figure 1.

schools have increased to approximately 40 as of June, 1999 (see Figure 1). A few existing Montessori schools, both private and public, are choosing to convert to charter schools. Montessori charter schools are emerging strong because, in contrast with many improvised community charter schools, they have a well-designed curriculum with strong organizations to supervise their standards, providing a unique form of stability. The availability of federal grants for charter school design and start-up, to be distributed through state departments of education from 1999 through 2004, bodes well for the future of Montessori charter school start-up.

Charter schools are small, particularly compared to other public schools, with a median enrollment of about 150 students. In size, this makes the charter school more like the private school, which usually ranges from 30 to 300 students. More than 60% of charter schools have fewer than 200 students.[4] Although charter schools are free of the burdens of central administration, they take on a few burdens of their own:

- They must write their own grant proposals, maintain their own bookkeeping, respond to special education needs, address building management, control purchasing, and initiate

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[4] Ibid.

interagency contracts where necessary (psychological services, social workers, health care, etc.), all with very limited staff. A charter school is, in effect, a school district unto itself.

- They are placed under high scrutiny for their academic achievement and are totally accountable to parents and the state through state-mandated proficiency exams.
- Their teachers must be both Montessori-trained and state-certified; such personnel, if available, are often able to demand very high salaries.
- Lack of clear information channels within the state department of education can cause stress for charter school board members.
- Political resistance by local school districts may be formidable.
- Charter schools are not allowed to exercise selective admissions relative to Montessori background. Children are admitted on a first-come, first-served basis.
- Charter schools have limited resources to make their programs work, especially with the high start-up costs associated with Montessori materials. Usually they require community funding above and beyond what the state provides.

The most positive feature of Montessori charter schools is that they permit full realization of the Montessori vision, whereby high achievement is fostered through the Montessori method, not through curriculum-and-instruction mandates from on high. This is because charter schools, by design, tend to focus on high academic expectations, supportive environment and staff, and a flexible approach geared to individual needs, due to their relative smallness and independence of central bureaucracy.

Applying to the District or State

Montessori schools being founded within a public school district or as independent charter schools must follow application guidelines set forth by the district and the state. Public and charter school applications usually require the following components:

The charter application of the Old Brooklyn Montessori School, Cleveland, OH, is available from NAMTA. See Further Reading from NAMTA, at the end of this chapter.

- **Statement of Need**: This is usually determined by local conditions which establish parental demand for Montessori.
- **Montessori Philosophy of Education**: Chapter 4 of this handbook provides a philosophical and methodological overview of Montessori by age level. NAMTA also distributes a curriculum "scope and sequence" document developed by Ruffing Montessori School East, Cleveland Heights, OH, in 1991 (see Further Reading from NAMTA, at the end of this chapter).

- **Comparisons between Montessori and Non-Montessori Curriculum**: This must be done by aligning local district goals and objectives, or state goals and objectives, alongside the appropriate Montessori goals and objectives (see this chapter's Sample Document). In the event that Montessori does not include a state objective, the side-by-side comparison shows the discrepancy and lays out a plan for adding the missing objective to the Montessori curriculum. NAMTA distributes the curriculum alignment document from Mitchell Montessori School, Denver Public Schools, CO (see Further Reading from NAMTA, at the end of this chapter).
- **School Goals and Objectives**: These include the mission of the school, student performance objectives, attendance outcomes, and graduation rate outcomes.
- **Evidence of Community Support:** Especially for charter schools, a clear connection to private-sector Montessori, to community agencies, and to political leadership helps establish the viability of the school.
- **Assessment and Internal Documentation:** Refers to how Montessori schools document and report student progress.

See Chapter 11 for more information on student records and progress reporting.

- **Governance and Operations:** Includes governing board, public accountability, reporting procedures, parent and community participation, discipline, and discontinuance of board operations.
- **Employment Policies and Practices:** Includes employee relations, certification, employee compensation, recruitment policies, and grievance procedures.
- **Enrollment Policy:** Includes Montessori experience, out-of-district students, diversity plan, exceptional students, at-risk students.
- **Facilities Plan:** Includes timeline, funding, rented facilities, permanent facilities, and facility maintenance.

Montessori Implementation

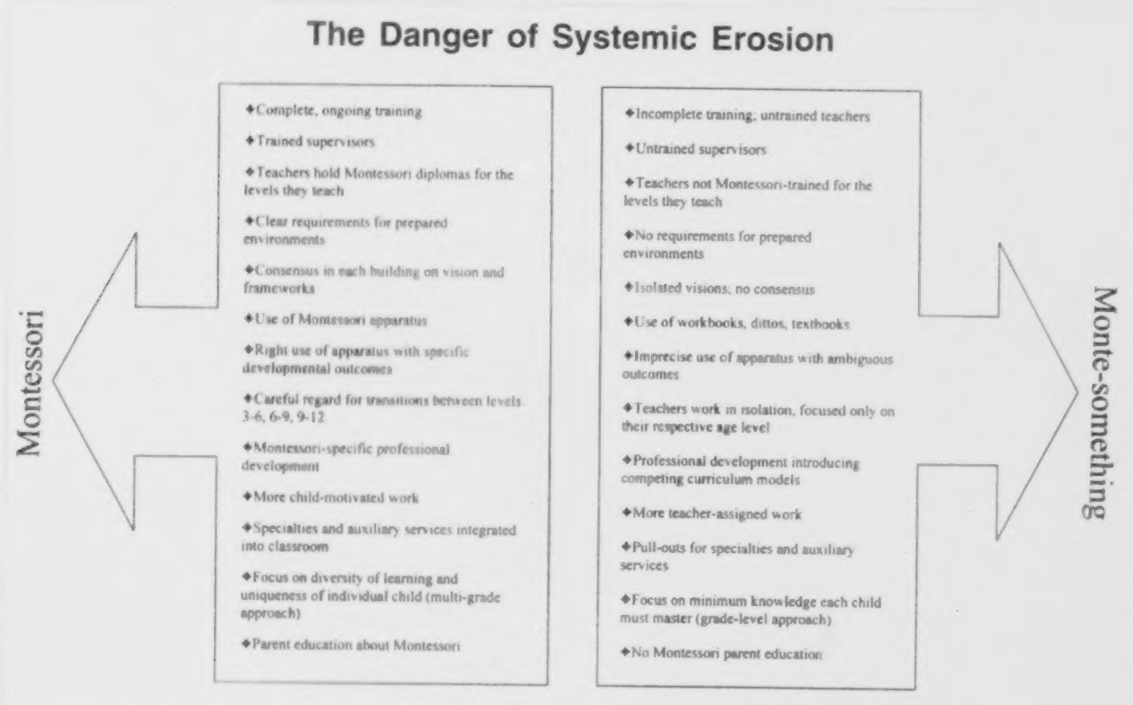
Today, Montessori is viewed as a comprehensive curriculum that works when the community, the school staff, the administration, and the parents are in agreement with the tenets of Montessori philosophy. This means that teachers should all be Montessori trained, and the philosophical belief in Montessori pedagogy should be fundamental to daily classroom practices and child-rearing at home. Once it has been established that Montessori is a successful and unique design, the challenge is to maintain it as a unique Montessori offering. Professional development is particularly critical to the preservation of an internally consistent Montessori design.

Even with the best of training and equipment at the beginning, Montessori in public schools can be threatened by systemic shortcomings:

- Over-emphasis on assessment

- Management by objectives
- Mandated non-Montessori curriculum in constant turnover
- Reversal of desegregation policies as districts revert back to segregated neighborhood schools, causing schools to lose children with Montessori background
- Funds scarcity resulting in reduction of assistant staff and prepared environment refinements
- Building principal and superintendent turnover

Systemic erosion of public Montessori implementation can happen in spite of Montessori consultation and professional development because the district's centralized policies may simply be adverse to Montessori. Figure 2 shows the systemic erosion that may undermine a public Montessori program: incomplete training, untrained teachers, untrained supervisors, teachers not trained for the levels they teach, no requirements for the prepared environments, use of workbooks and textbooks, etc. Over time, eroded Montessori becomes unrecognizable. Compromise leads to compromise, resulting in a critical breakdown of the school's Montessori identity. Teachers begin to introduce packaged curriculum options other than Montessori. Specialty classes undermine the work cycle. Programmed time blocks and assigned work replace student choice. Parent education resorts to the latest community fad, not Montessori principles.



The Danger of Systemic Erosion

- ◆Complete, ongoing training
- ◆Trained supervisors
- ◆Teachers hold Montessori diplomas for the levels they teach
- ◆Clear requirements for prepared environments
- ◆Consensus in each building on vision and frameworks
- ◆Use of Montessori apparatus
- ◆Right use of apparatus with specific developmental outcomes
- ◆Careful regard for transitions between levels 3-6, 6-9, 9-12
- ◆Montessori-specific professional development
- ◆More child-motivated work
- ◆Specialties and auxiliary services integrated into classroom
- ◆Focus on diversity of learning and uniqueness of individual child (multi-grade approach)
- ◆Parent education about Montessori

- ◆Incomplete training; untrained teachers
- ◆Untrained supervisors
- ◆Teachers not Montessori-trained for the levels they teach
- ◆No requirements for prepared environments
- ◆Isolated visions; no consensus
- ◆Use of workbooks, dittos, textbooks
- ◆Imprecise use of apparatus with ambiguous outcomes
- ◆Teachers work in isolation, focused only on their respective age level
- ◆Professional development introducing competing curriculum models
- ◆More teacher-assigned work
- ◆Pull-outs for specialties and auxiliary services
- ◆Focus on minimum knowledge each child must master (grade-level approach)
- ◆No Montessori parent education

Figure 2.

Eventually, Montessori teachers begin to leave as the school experiences a lack of cohesion around philosophy and vision. A school divested of its Montessori identity but still calling itself Montessori experiences an unnerving alienation. The affliction of Monte-something can choke out a school because Monte-something still operates with some Montessori features and habits, but these become meaningless overall. The school seems unable either to adopt a specific non-Montessori identity or to return to an authentic Montessori model.

Yet public Montessori schools need not be victims of systemic erosion if positive steps are taken to ensure Montessori authenticity. To create an authentic Montessori program, the following implementation guidelines are applicable to Montessori Head Start, magnet schools, and charter schools:

1. Do a total Montessori program.

Montessori cannot be done piecemeal; it is a total curriculum approach that is integrated and sequential. Full benefits can be achieved only if the dynamic of the total program is understood by a Montessori-trained teaching staff that shares a common educational philosophy. Montessori programming should be implemented in its entirety, with minimal interruption from auxiliary classes or services.

2. Provide Montessori-trained teachers and quality teacher assistants.

The name "Montessori" is not a registered trademark in the United States; there are many independent Montessori training programs with differing standards. A 1988 NAMTA survey of public Montessori programs indicated that most required the credentials of either the Association Montessori Internationale (AMI) or the American Montessori Society (AMS); based on the employment advertising NAMTA receives from public schools, this still seems to be true. There is a limited availability of experienced Montessori-trained teachers; therefore strategies for recruitment or sponsorship of staff require advance planning. Some schools use grant monies or parent fundraising, in addition to district funds, to sponsor trainees, either from within the district or from the outside. Sponsorships usually cost between $5,000 and $10,000 per trainee for tuition and related expenses. School representation at national Montessori conferences can help to build the national visibility and connections necessary for good recruitment.

Public Montessori schools usually maintain one teacher and one paraprofessional assistant per classroom for preschool levels. Elementary classes, on the average, work with one teacher and a part-time assistant. Class numbers range from 25 to 30 students.

Montessori training is intensive and imparts an attitude as well as information. The training includes Montessori child psychology, educational theory, material demonstrations, supervised practice with Montessori apparatus, observation of Montessori classrooms, supervised practice teaching, and extensive written and oral exams. Montessori training is recognized by selected colleges and universities at both the graduate and undergraduate levels. Generally the academic phase requires either three consecutive summers or one academic year of full-time attendance and study. Short, in-service workshop sessions cannot substitute for formal pre-service training with at least 600 contact hours.

3. Progress slowly and phase in each progressive level.

Montessori programs conventionally start at age three with multi-aged groups of three-, four-, and five-year-old children. The elementary curriculum builds as the children move through the program one year at a time. Though it is optimal for programs to start at the preschool level, this may not always be feasible for public schools, whose funding is sometimes limited to children five and up.

Some schools begin their program at the kindergarten level, with nearby private Montessori preschools providing some Montessori-prepared students for the public kindergarten. Even in this situation, the three- and four-year-old levels should be added as soon as possible. In some instances, parents have successfully lobbied the state to fund the three- and four-year-olds; in other cases, the school uses a blend of district and Head Start funds to include the younger children.

Orientation of new students at the beginning of each academic year should include the gradual integration of small groups over several weeks—never all at once. Admission of children over age four without Montessori background should be limited.

See Chapter 7 for more information on admissions and orientation.

4. Use multi-aged groups, which are an essential part of Montessori education.

Montessori programs group children as follows:

- Preschool: Ages 3-6+
- Lower Elementary: Ages 6-9
- Upper Elementary: Ages 9-12

Multi-aged clusters enhance the Montessori dynamic by reducing competition, maximizing curriculum options available to any one child, providing a family atmosphere that plays a vital role in socialization, and permitting older children to model advanced work for younger children. Because one set of materials suffices for three grades, multi-aged clusters are cost effective.

5. Purchase the full complement of Montessori materials for each classroom from authorized manufacturers.

The costs of funding an ongoing Montessori program will not exceed costs associated with the operation of any other elementary school program, apart from the initial setup costs for each emerging level.

Each Montessori classroom has the following start-up costs and general maintenance expenses (1999 figures):

- Montessori materials: preschool, $23,000-$24,000; elementary, $25,000-$26,000
- Shelving, small tables, chairs: $4,000-$6,000
- Misc. equipment and books: approx. $3,000
- Annual maintenance (consumables): approx. $800

Materials include practical life setups, handmade materials, Montessori apparatus, and consumable supplies. Montessori materials may seem expensive, but they should be seen as textbook and workbook substitutes that will not have to be replaced, provided the teacher encourages their proper use.

Special budgetary considerations must be made for the start up and initial implementation of the Montessori program. For example, the special Montessori environments will need two weeks of setup time prior to the first year of the program. Personnel costs should be set aside for the principal, main teachers, and office staff for this purpose.

6. Hire a Montessori coordinator with curriculum knowledge and authority.

Someone in a position of program leadership, whether administrator or "teacher on special assignment," must have experience and Montessori training, ideally at both the preschool and elementary levels. The Montessori specialist is often hired to supervise ordering and preparation of Montessori materials, parent education, expanding levels of Montessori, staff development, program evaluation, and curriculum implementation. He or she may also document the correlations between Montessori and district curriculum expectations, as required by the district.

The major responsibilities of the Montessori program coordinator or resource teacher are:

- To assist in recruiting and hiring Montessori-trained teachers and assistants.
- To order materials.
- To establish and supervise Montessori classrooms, including planning and record keeping.
- To develop and maintain parent education.
- To oversee the preparation of Montessori materials.
- To organize parent volunteers.
- To coordinate staff development activities with teachers and assistants in and out of the classroom.

- To plan and execute the creation of additional levels and components of the Montessori program.
- To complement the principal, elementary educational administration, and central administration in the pursuit of the development and implementation of the Montessori program.
- To assist the principal in the preparation of periodic reports on the development and implementation of the Montessori program.
- To draft correspondence to teachers, administrators, parents, or community, and proposals to foundations, as needed, to support the Montessori program.
- To provide leadership and direction in regularly scheduled staff meetings.
- To act as a liaison between magnet school, public school, administrators, and community organizations.
- To develop Montessori-specific evaluation materials that also take into consideration district evaluation criteria.

7. Build a consensus among staff regarding curriculum goals in relation to pupil progress.

Teachers of various Montessori persuasions in the same school need to come to common understanding of their lesson planning and curriculum scope and pace. Expected levels of student achievement should be developed schoolwide. The budget should allow teachers to attend at least two local continuing education events and one national conference per year (estimated cost: $1,000 per teacher per year).

See Chapter 12 for more on the consensus process of developing curriculum and achievement expectations.

8. Use Montessori-specific mechanisms for reporting student progress to parents.

The Montessori program utilizes a unique approach to education that defines specific skill objectives differently than do most district curricula. Parents and teachers need a reporting and record-keeping system that accurately reflects the child's progress within a Montessori environment. Grades and number scores on report cards are not compatible with Montessori philosophy.

See Chapter 11 for more information on student progress reporting.

9. Involve parents and the community.

Community forums that deal with aspects of Montessori parent education are recurring events for increasing public awareness and keeping parents informed of ways to bring Montessori into their homes. Parent volunteerism is vital to school fundraising and other school-related projects. Academic achievement is directly proportional to parent involvement.

Public School Montessorian, published by Jola Publications, Minneapolis, MN, is a grassroots source of information on public Montessori. See Appendix 4 for contact information.

SURVEY OF SELECTED PUBLIC MONTESSORI SCHOOLS

The following information is based on a telephone survey of selected public Montessori schools in June, 1999.

School	Denison Montessori School Denver, CO	North Avondale Montessori School Cincinnati, OH	Faxon Montessori School Kansas City, MO	Bennett Park Montessori School Buffalo, NY	MacDowell Montessori School Milwaukee, WI
Year Program Began:	1985	1976	1985	1976	1982
# of Children Served:	500	542	325	600	615
# on Waiting List:	100	182	1000-1500	600+	150
Racial Diversity:	50% minority 50% non-minority	52% minority 48% non-minority	65% minority 35% non-minority	60% minority 40% non-minority	63% minority 37% non-minority
Percentage Achieving at or above Grade Level in Reading:	68%	80%	96%	75%	90%
School's Achievement Ranking within District:	2nd out of 78	Top 10%	Top 1/3	Top 1/3	Top 10%

Local private Montessori schools should be consulted for their Montessori expertise and guidance. Long-term success of the public school program is based on a policy of mutual respect between private and public Montessori institutions from the start.

10. Align outside assessment instruments with the Montessori curriculum.

Although Montessori children have historically tended to score well on standardized tests, too often the increased emphasis on state and district competency-based testing may permanently alter Montessori attitude and content.

See Montessori Assessment: The Challenge Ahead, in Chapter 11.

With the increasing availability of alternative assessment instruments, better alignment of assessment and Montessori curriculum can be attained. It is important that Montessori goals and standards be identified and assessed so that newly trained Montessori teachers are given incentives to practice Montessori education.

Assessment should seek to measure external conditions such as parent satisfaction, parent participation, and desegregation, as well as intrinsic Montessori standards and values.

Frequently Asked Questions

How does one go about starting a public Montessori school?

There are several options available for Montessori implementation in the public sector:

- A district-managed Montessori magnet school with federal start-up grants;
- A district-supported Montessori school (magnet or otherwise) without federal monies; or

- A state-supported or district-supported charter school operated by an independent board.

Approximately half of all Montessori schools started in the public sector have been a result of parent lobbying and/or parent organization. Districts listen to parents and, even more, to parent groups. In addition, state boards of education are looking for stable groups to set up charter schools, although it has become a new tendency among charter school grantmakers to encourage board composition of community leaders rather than parents of children in the school.

A public Montessori initiative can be aided by many of the printed materials in this book. Often parent groups can be assisted by a local Montessori expert who is able to advise the effort and persuade district personnel. Finding a willing superintendent is another step, but critical to the effort is finding a sympathetic building principal willing to take on the fledgling project within his or her building.

NAMTA offers a free booklet, *Montessori in the Public Schools: Implementation Basics,* to assist people in writing proposals for public Montessori programs. It includes a basic introduction to Montessori, special public school concerns, and a summary of research. See Further Reading from NAMTA, at the end of this chapter.

Where can Montessori-trained teachers be found for a public Montessori start-up?

If the school start-up is small and slow, it might suffice to advertise in national Montessori publications, specifying a need for state-certified teachers with Montessori training. Unfortunately, such a teacher is a rare commodity and can command a high salary.

See Chapter 9 for a list of Montessori publications that accept employment advertising.

In the case of larger projects with more than three or four teachers, it might be necessary to consider sponsoring candidates to take training at a reputable Montessori training center. If a project is large enough to require fifteen or more teachers, it should consider contracting with a training center to offer on-site training, which requires lead time of at least one year, especially if the training center is outside of the school's community. Local training is always better than imported because it is closer to the implementation site and therefore available to guide the implementation process even after training. A local training center may also be more accountable.

See Chapter 9 for more information on sponsoring a trainee.

Training should have a solid pre-service component–not less than 400 contact hours. An anchor trainer should be present for most of the course so as to be responsible for an overview of each trainee's personal development. Courses of the Association Montessori Internationale (AMI), for instance, require 600 contact hours, with the anchor trainer required for 90% of the lectures.

Avoid contracting directly with an individual to offer teacher training. A trainer unaffiliated with any Montessori association or training center has no objective standard to cite in matters of course content or student evaluation. Furthermore, paying the trainer directly, rather than through a training center, may create a conflict of interest when it comes to student evaluation.

Further Reading from NAMTA

The following articles and documents are available as photocopies from NAMTA. See Appendix 4 for ordering information.

Application for Charter, Old Brooklyn Montessori School, Cleveland, OH, 1998. 248 pages. $50 plus shipping.

Berno, Kay. "Is Montessori Possible in the Public Schools?" *The NAMTA Quarterly* 10.1 (1985, Spring): 34-37. 2 total pages.

Biwer, Paula. "Mitchell Elementary School [Denver, CO]: A Profile Sketch." *The NAMTA Journal* 14.1 (1988-89, Fall-Winter): 10-13. 3 total pages.

Boehme, Keith, & Elizabeth Wymer. "Public Montessori and State-Mandated Assessment." *The NAMTA Journal* 22.1 (1997, Winter): 185-188. 3 total pages.

Boehnlein, Mary Maher. "The Montessori Public School Consortium and the Future of Montessori Research." *The NAMTA Journal* 15.2 (1990, Spring): 85-93. 5 total pages.

Cincinnati Public Schools Montessori Assessment Committee. "Philosophy Statement for the North Avondale Montessori School." *The NAMTA Journal* 22.1 (1997, Winter): 175-184. 6 total pages.

Clifford, Alcillia, & David Kahn. "Montessori Head Start: Implementation Brief." *The NAMTA Journal* 20.2 (1995, Spring): 105-114. 6 total pages.

Clifford, Alcillia, & Carol Takacs. "Montessori Education for All." *The NAMTA Journal* 15.2 (1990, Spring): 65-69. 3 total pages.

Comparison of Scope and Sequence of Denver Public Schools with Curriculum of Mitchell Montessori School. Denver, CO, 1993. 163 pages. $50 plus shipping.

Curriculum Scope and Sequence, Ruffing Montessori School East, Cleveland Heights, OH, 1991. 237 pages. $50 shipping.

Duax, Tim. "Milwaukee: Ten Constructive and Influential Years, 1976-1986, a Montessori Program in the Public Schools." *The NAMTA Journal* 12.2 (1987, Winter/Spring): 32-36. 3 total pages.

Haines, Annette M. "Equal Opportunity and the Montessori Magnet School." *The NAMTA Journal* 20.1 (1995, Winter): 159-177. 10 total pages.

Haines, Annette M. "Montessori and Assessment: Some Issues of Assessment and Curriculum Reform." *The NAMTA Journal* 20.2 (1995, Spring): 116-130. 8 total pages.

Kahn, David. *Montessori in the Public Schools: Implementation Basics.* Cleveland, OH: Montessori Public School Consortium, 1993. 20 pages. Free.

Kahn, David, ed. *Implementing Montessori Education in the Public Sector.* Cleveland, OH: NAMTA, 1990. Approx. 500 pages. $15 plus shipping, while supplies last.

Kramer, Rita. "Marva Collins, American Public Education, and Maria Montessori." *The NAMTA Quarterly* 8.3 (1983, Summer): 1-9. 5 total pages.

Lucas, Pearl. "Opportunity for Renewal: Montessori in the Inner City [Public School 123, Harlem, New York]." *The NAMTA Quarterly* 6.2 (1981, Spring): 1-4. 3 total pages.

O'Dwyer, Mary; O'Dwyer, Sean; Williams, Margaret. "Cincinnati's Public School Montessori Program." *The NAMTA Quarterly* 6.2 (1981, Spring): 10-12. 2 total pages.

Peterkin, Robert. "Progressive Vision, Leadership, and System Change." *The NAMTA Journal* 19.1 (1994, Winter): 121-135. 8 total pages.

Skovsted, Marlene. "Montessori in Milwaukee Public Schools." *The NAMTA Quarterly* 6.2 (1981, Spring): 5-9. 3 total pages.

Sommer, Sandra J. "Implementing Montessori in the Urban Sector." Presented at NAMTA conference on educational reform, Washington, DC, February 28-March 3, 1991. *The NAMTA Journal* 16.2 (1991, Spring): 55-58. 3 total pages.

Williams, Phyllis. "Montessori in Cincinnati Public Schools: Past, Present and Future." *The NAMTA Quarterly* 10.1 (1985, Spring): 38-39. 1 total pages.

Williams, Phyllis J. "Cincinnati: Developing the Montessori Magnet School [North Avondale Montessori School]." *The NAMTA Journal* 12.2 (1987, Winter-Spring): 37-42. 4 total pages.

Sample Document

The following document illustrates common practices in Montessori school operations. To view document at full size, photocopy and enlarge.

Curriculum Scope and Sequence (Excerpt), Mitchell Montessori School (Denver, CO)

Mathematics **Grade 1**

Denver Public Schools Scope and Sequence		Mitchell Montessori Curriculum	Mitchell Montessori Extensions
Numbers	• emphasis on reading, writing, counting, ordering whole numbers through 100 • introduction to place value through tens, fractions through fourths, even and odd numbers, number patterns • extension of sets and ordinal numbers to twentieth, attributes including sequencing • introduction to understanding and use of mathematical symbols (+ - = > <), properties of zero and commutativity, and basic mathematical vocabulary	Matches DPS Scope & Sequence *Grade 1 Handbook*, pp. 6-10	Count by 1's through 10's to 1,000 using manipulatives. Work with concrete representations of number categories through 1,000,000. Fractions through 10ths are illustrated with manipulatives.

Mathematics **Grade 1**

Denver Public Schools Scope and Sequence		Mitchell Montessori Curriculum	Mitchell Montessori Extensions
Operations	• extension of addition of whole numbers including facts to 10, missing addends, adding two-digit numbers without regrouping with an emphasis on problem solving • introduction to subtraction of whole numbers including facts to 10, missing subtrahends, subtracting two-digit numbers without regrouping with an emphasis on problem solving	Matches DPS Scope & Sequence *Grade 1 Handbook*, pp. 12-14 Children use concrete representations of units, tens, hundreds, and thousands with color coded cards to carry out addition, subtraction, multiplication, and division problems with 4-digit numbers (with and without regrouping). These materials are also used in solving word problems. As ready developmentally, begin to use more symbolic representations of quantities and symbols.	Continue memorization of math facts using manipulatives.
Geometry	• extension of identifying geometric shapes including basic solid figures • introduction to the concepts of symmetry, congruence, geometrical patterning	Matches DPS Scope & Sequence *Grade 1 Handbook*, pp. 16-17 Construct plane geometric shapes using manipulatives.	Explore the concepts of congruence, similarity, and equivalence using manipulatives.

This curriculum scope and sequence shows alignment of Montessori goals and objectives with district goals and objectives. Mitchell, now known as Denison Montessori School, is a public Montessori program in the Denver Public Schools. The complete scope and sequence document is available from NAMTA; see this chapter's Further Reading from NAMTA.

Progressive Vision, Leadership, System Change, and Montessori

by Robert Peterkin, EdD

In the following excerpts from an address at a 1993 NAMTA conference in Kansas City, MO, Dr. Peterkin, director of Harvard University's Urban Superintendents' Program, outlines his vision of a new school leadership and Montessori's place in that vision. Reprinted from MPSC Update *2.2, February, 1994.*

I think that I can help us develop a dialogue about the kind of visionary leadership required in this moment in the history of American education. The major role of that leadership is to identify and support those visions, approaches, and programs which demonstrate their power in enhancing the life chances of our children.

Let me use some personal examples of my most recent experience in Milwaukee, Wisconsin, where I served as superintendent. Greenfield and MacDowell Montessori schools were found to be true to their vision, the district's mission, and the needs of their student population; in other words, their students' academic achievements and their life chances were being enhanced.

Based on [my Milwaukee] experience and twenty-five years of work in the urban public schools of Cambridge and Boston, Massachusetts, and in the alternative schools of New York, I have come to the conclusion that America's response to the current school crisis is simply too timid. I advocate a new leadership that will transform America's schools, a new leadership that will shed the timidity of our current efforts and promote bold change that results in enhanced student outcomes. That leadership must accept the fact that the transformation of our nation's schools is an inescapable fact. Transformation is needed for a very basic reason: The traditional hierarchical factory model of education is obsolete. We must have a leadership that recognizes that schools currently do not deal with or support the diversity of our new student population and do not provide students with an understanding of their culture and other cultures of this country and the world. We must have new leadership that recognizes that the transformation of America's schools is a complicated and comprehensive process. Without such a holistic view, school transformation will continue to be incremental and incidental.

Visionary leadership for tomorrow's schools needs to explore the "islands of success" from around the nation that have had a positive impact on outcomes for children, especially poor and minority children, so that such programs can be expanded into "systems of success."

This is where Montessori can take a leadership role in systemic educational reform. Most school reform has been of the "top down" nature, with lots of mandates and rhetoric, and little understanding of the teaching/learning process. Few, if any, legislators, school board members, and, regretfully, superintendents understand the developmental cycles of learning–for adults or children. While they all hope that "all children can learn," they have little knowledge as to how to structure learning environments to turn that hope into a reality. This is the reason we see the increased interest in such public/private efforts as the Edison Project, Educational Alternatives, Inc., and even the Walt Disney Corporation. Our public school systems are crying out for help! This is where the Montessori Public School Consortium can sustain the Montessori vision while assisting the public schools of this nation to develop their own, each being compatible and supportive of the other. You can be at the cutting edge of school reform!

The Montessori Public School Consortium, in partnership with NAMTA, offers services to public Montessori schools, including an annual conference and occasional publications. Contact MPSC, 11424 Bellflower Road, Cleveland, OH 44106, phone (216) 421-1905, fax (216) 421-8193.

First of all, Montessori has a well-articulated vision, philosophy, and pedagogy. Montessori has a teacher training arm that is national and international in scope. Montessori has a proven track record in over one hundred school systems.

Montessori education also has other characteristics that are supposedly beloved by reform-minded systems: parental participation, diversity, and "respect for the child's potential." With regard to diversity, Montessori schools are probably better integrated than our urban schools, according to the 1988 NAMTA Public School Survey, with nearly two-thirds of responding schools having waiting lists of up to five hundred students. A superintendent's dream! Since Montessori education is based on a vision of total child development, compatibility with district visions of "all children can learn" is a marketing problem, not an educational one.

In addition to the Montessori vision, [the public Montessori schools in Milwaukee] also responded to the vision of the system with respect to fairness (assignment), diversity (social and well as economic), program integrity, and student outcomes. [Such responsiveness] also allows Montessori schools to take their rightful place in a reform agenda, perhaps a leadership role in helping others articulate their visions for schools that are much different than Montessori but are concerned about the welfare and growth of children.

Those who are in the public education arena, with responsibility for the education of millions of students, must be allowed the latitude to find new solutions to persistent problems.

We must have a conversation that stretches out across this nation and creates an advocacy for children. Superintendents of schools must embrace a new agenda, discharge their responsibilities in powerful and supportive ways for children, and not succumb to the traditional compromises made at this level which disenfranchise our children.

I am more than ever convinced that the future of our children lies in a visionary leadership which insists upon the rights of children to a superior quality of life. Unless we are all prepared to make that same commitment, we will not succeed as a nation.

The Prepared Environment at the Preschool and Elementary Levels

Introduction

Children construct themselves and develop their potential through interaction with the environment. Montessori emphasizes careful preparation of environments that respond to the specific needs and tendencies of children at each stage of development. These "prepared environments" are sensitively created and maintained by the adult to provide optimum conditions for independent activity and full development of individual potential.

The prepared environment is more than materials; it involves the careful coordination of space, people, and time as well as the selection of activities and materials. The way in which these elements are combined will vary according to the stage of development. Yet each environment provides full opportunities for individual development within the context of a social community.

Space designs and furnishings integrate the indoor and outdoor environments and respond to the physical, social, and psychological needs of children at various stages. Through planned admissions, environments have a balanced mix of ages and sufficient numbers of children to promote a vibrant social community. The adults are carefully trained to link children to activities and to promote a positive emotional climate in the environment. The adult/child ratio, although different for various developmental stages, ensures optimal opportunity for development of independence.

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Time is another key element of the prepared environment. Children are drawn toward purposeful work and are able to work with concentration for extended periods. The environment must provide time for uninterrupted work cycles. There should be a minimum of three hours of time unbroken by arbitrary schedules or collective activities. Decisions about the use of specialists must carefully consider the importance of uninterrupted time in the child's daily environment.

Materials in the Montessori environment are presented as keys to further independent activity and exploration. Their purpose is to initiate extended activity, which is the basis for the child's own self-construction. Following is a detailed list of materials to be included in the prepared environments of the preschool (3-6) and elementary (6-9 and 9-12) levels.[1] It is important to remember that Montessori views the curriculum as a continuum; consequently, the materials of the various levels are interrelated. Frequently, the same material may be used at several levels, but with a different focus or purpose. Furthermore, although materials are categorized here (practical life, language, etc.), their presentation and use in the classroom is integrated to reflect the interrelatedness of all the disciplines–and of life itself.

Practical Life

Practical life activities encourage the development of independence and foster the child's adaptation to the social context of his or her environment. At the preschool level, practical life activities include care of self, care of the environment, exercises of grace and courtesy, and control of physical movement. At the elementary level, practical life is expressed through social organization of tasks for the benefit of the class community, as well as the preparation and activities involved in "going out."

Practical Life for the Preschool: Activities and Materials Overview

1. Preliminary Exercises

Preparation for Using Water:

- Operating a Faucet
- Pouring Rice:
    pitchers, small, glass
    rice, long grain
    tray, small, colored (5"x7")

Exercises for Using Water:

- Pouring Water
    cloth, small
    containers, small, different shapes & sizes
    cup and saucer, small
    funnel
    glass, small
    markers to indicate plant has been watered
    pitchers, small glass
    plants
    sponge, small
    tray, small (5" x 7")
    vases: clear, opaque
    watering can
- Filling a Pitcher:
    pitchers, glass, beautiful
    pitcher, heavy, metal
- Etc.

Exercises in Carrying:

- Carrying a Chair
- Carrying a Table
- Carrying Apparatus
- How to Carry, Roll and Unroll a Mat:
    1.640.00 to 1.644.00 carpets (rose, green, blue, gray, brown) (2 each)

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[1] Numbers given in the lists that follow are the Nienhuis order numbers. See Appendix 4 for a list of Montessori materials suppliers.

  1.731.00 stand for 3 carpets (3) *or* 1.732.00 stand for 5 carpets (2)
- Carrying Sharp Objects:
  - 7.701.00 scissors with rounded point 10 cm
  - 7.708.00 six-scissor storage block
  - knives
- Etc.

Exercises for Polishing:

- Making a Cotton Applicator
- Operating a Dropper
- Etc.

Exercises in Opening and Shutting:

- Doors
- Windows
- Boxes
- Bottles and Jars
- Etc.

Exercises in Folding:

- Napkins
- Dusters
- Towels
- Etc.

Exercises in Cutting:

- Scissors and Paper
  - 5.677.00 scissors exercise
  - 7.701.00 scissors with rounded point 10 cm
  - 7.708.00 six-scissor storage block
- Knives with Rounded Points
- Etc.

2. Care of the Person

- Dressing and Undressing (dressing frames)
  - 0.001.00 buttoning frame with small buttons
  - 0.002.00 buttoning frame with large buttons
  - 0.003.00 bow tying frame
  - 0.004.00 lacing frame
  - 0.005.00 hook and eye frame
  - 0.006.00 safety pin frame
  - 0.007.00 snapping frame
  - 0.008.00 zipping frame
  - 0.009.00 buckling frame
  - 0.010.00 shoe buttoning frame
  - 0.011.00 shoe lacing frame
  - 0.012.00 Velcro™ frame
  - 1.632.00 dressing frames stand
- Polishing Shoes:
  - 4.014.00 shoe polishing brush set (also included in 1.727.00)
  - applicator
  - apron
  - baskets
  - brush, soft, hard
  - buffer
  - cloth, duster
  - dust/polishing cloth
  - paper, large, white
  - polish: black, brown, neutral
- Combing Hair:
  - chair
  - comb for each child
  - dressing table with mirror
  - wall hanging case to hold combs
  - wastebasket
- Washing Hands:
  - basin, glass
  - dish, small
  - fingernail brush
  - pitcher, glass
  - soap dish
  - soap
  - sponge, small
  - towel, small, hand
  - tray
- Hanging Up Clothes:
  - clothes hanger or clothes rack
- Checking Overall Appearance:
  - full-length mirror
- Etc.

3. Care of the Indoor Environment

- Dusting:
  - 4.015.00 dust brush, small (also included in 1.727.00)
  - 4.042.00 dust brush (also included in 1.727.00)
  - apron
  - basket for dusters
  - dust/polishing cloth
- Washing a Table:
  - apron
  - basin, circular
  - brush, small, scrubbing
  - floor cloth
  - pail with spout and handhold underneath
  - soap dish
  - soap, small piece
  - sponge, small
  - two-quart pitcher
  - wash cloth for drying
- Polishing a Small Wooden Object:
  - apron
  - basket
  - castor or butter pat dish
  - cloth for applying polish
  - cloth for rubbing in the polish
  - cloth for final polishing
  - placemat
  - polish
  - polish dispenser, small
  - spoon, small
- Polishing Metal:
  - 4.033.00 8-piece brassware set (Items for polishing must be used elsewhere in the room. They do not sit with the materials for polishing. The items in this set could have a decorative function.)
  - apron
  - basket
  - brass polish, non-toxic
  - brush, small
  - cotton balls

  - dish, small
  - metal polish (glass wax)
  - objects to polish
  - oilcloth
  - orange stick
  - polishing cloth
- Polishing Silver:
  - apron
  - basket
  - butter pat dish
  - cloth, small
  - cotton balls
  - dispenser bottle
  - oilcloth
  - orange stick
  - silver polish
- Sewing:
  - 7.701.00 scissors with rounded point 10 cm
  - 7.708.00 six-scissor storage block
  - basket
  - buttons
  - cloth
  - container to hold buttons
  - needle
  - pincushion
  - thread
- Sweeping:
  - 1.727.00 stand, practical life material, complete (shoe polishing brush set, dust brush sm., dust pan, soft broom, scrubber, rug beater, squeegee, dust brush)
  - chalk
  - confetti or sawdust
  - container for chalk
  - container for confetti or sawdust
  - sponge, small
  - tray
- Arranging Flowers:
  - 7.701.00 scissors with rounded point 10 cm
  - 7.708.00 six-scissor storage block
  - apron
  - basin
  - bucket
  - doilies, paper
  - drying cloth
  - funnel
  - oilcloth
  - pitchers: medium-sized, large
  - sponge
  - trays
  - vases
- Washing Cloths:
  - basin: circular, rectangular
  - basket for cloths
  - clothespins and line or drying rack
  - pail with pouring lip and handhold
  - pitcher
  - oilcloth
  - scrub board
  - soap
  - soap dish
- Ironing:
  - ironing board
  - iron
- Preparing Food:
  - aprons
  - bowls of various sizes
  - bread pans
  - brushes, vegetable
  - chopping knife
  - cloth, small
  - convection oven
  - cutting board
  - flatware
  - ingredients for baking bread, etc.
  - pastry brush
  - potato peeler
  - small sponge
  - toaster
  - towel
  - trays
- Setting a Table:
  - dishes
  - flowers
  - glasses
  - napkins
  - pitcher
  - silverware
  - table cloth
  - vase
- Clearing a Table:
  - same as for setting a table
- Crumbing a Table:
  - crumber set

4. Care of the Outdoor Environment

- Sweeping Steps:
  - 1.727.00 stand, practical life material, complete (shoe polishing brush set, dust brush sm., dust pan, soft broom, scrubber, rug beater, squeegee, dust brush)
  - trash receptacle
- Picking up Debris in the Schoolyard:
  - trash bags
  - trash container
- Raking Leaves:
  - container or compost pile for leaves
  - rake
- Planting Flowers, Vegetables:
  - fertilizer (organic preferred)
  - garden tools
  - seeds
  - etc.

5. Exercises of Grace and Courtesy

- Blowing one's nose
- Covering one's mouth for a sneeze or cough
- How to yawn
- Opening a door to receive someone and inviting them to come in

- Shaking hands
- How to talk softly but audibly
- Offering an object to someone
- Passing an object from one person to another
- How to ask for something
- How to accept
- How to refuse
- Thanking someone
- Accepting thanks
- Excusing yourself
- How to apologize
- Passing behind so as not to disturb others
- How and when to interrupt
- Sitting down
- Standing up
- Etc.

6. Movement Exercises

Walking on the Line (Note: The line is to be an unobtrusive indication of where to put the feet, usually made with tape on the floor.)

Silence

Sensorial

The sensorial materials enable the young child to discriminate, order, and classify sensory impressions in relation to length, size, color, pitch, smell, etc. The addition of language gives the child a beginning "scientific vocabulary" to describe and compare qualities of objects.

Sensorial Exercises for the Preschool by Approximate Age of Introduction

Age 2½ to 3:

0.019.00	cylinder block #1 (increase in height and diameter) (pincer grasp)
0.020.00	cylinder block #2 (increase in diameter, height constant) (pincer grasp)
0.021.00	cylinder block #3 (decrease in height, increase in diameter) (pincer grasp)
0.022.00	cylinder block #4 (increase in height, diameter constant) (pincer grasp)
0.024.00	pink tower (variation in three dimensions)
0.024.10	stand for the pink tower
0.025.00	brown stair (variation in two dimensions)
0.026.00	long rods, red (variation in one dimension)
0.051.00	first box of color tablets (primary colors)
0.052.00	second box of color tablets (secondary colors)
	materials for preparation of fingertips: tray small bowl small terrycloth towels small pitcher
0.012.40	smooth gradation board
0.012.A0	rough and smooth boards set (lightness of touch)
0.014.00	rough gradation tablets (lightness of touch)
0.014.40	smooth gradation tablets
0.014.50	fabric box (sense of touch)
0.017.A0	blindfold
0.063.A0	bells set
0.063.B0	bells keyboards (2)
1.715.01	side panels for bell/tone bar cabinet
1.715.02	top & legs for bell/tone bar cabinet
0.048.00	geometric solids (kinesthetic sense)
0.048.A0	geometric plane figures with box
0.048.B0	geometric solids basket (2)
0.048.C0	geometric cards
0.037.00	geometric cabinet (visual and muscular memory, control of hand, pincer grasp)
0.038.00	demonstration tray

Age 3 to 3½:

0.016.00	sound boxes (auditory sense)
0.017.00	baric tablets (baric sense)
0.018.00	thermic bottles (sense of temperature)
0.049.00	constructive triangles (the triangle as the constructor of other geometric forms)
	sorting (discrimination of grains) (pincer grasp): trays grains of different kinds
0.017.30	mystery bags, empty, set of 2 (kinesthetic sense)
0.017.40	mystery bags, geometric shapes (kinesthetic sense)
0.017.70	mystery bags, familiar items (kinesthetic sense)

Age 3½ to 4:

0.131.00	binomial cube (visual and kinesthetic sense)
0.041.00	botany cabinet (visual and muscular memory, control of hand, pincer grasp)
0.198.00	botany puzzles (visual and muscular memory, pincer grasp)
0.199.00	animal puzzles (visual and muscular memory, pincer grasp) (A0 horse, B0 frog, C0 fish, D0 turtle, E0 bird)

Age 4 to 4½:

0.018.A0	thermic tablets (sense of temperature)
0.015.00	smelling bottles (olfactory sense)
0.049.00	constructive triangles (triangular, small, large hexagonal boxes)
0.186.00	table of Pythagoras

0.045.00 circles, squares, and triangles for superimposed geometric figures (visual sense)
0.045.50 inscribed and concentric figures, plastic (visual sense)
0.045.70 inscribed and concentric figures, paper (visual sense)
0.132.00 trinomial cube (visual and kinesthetic sense)

Age 4½ to 5:

0.023.00 set of knobless cylinders (visual and kinesthetic sense)
0.063.C0 bells numbered staff board (reading music)
0.063.D0 bells staff boards (2)
0.063.E1 bells music signs and notes (reading music)
0.015.50 tasting exercise:
small cups
spoon (clean spoon for each child)
pitcher

Age 5 to 5½:

0.053.00 third box of color tablets, (gradations of color—chromatic sense)
0.064.00 bells music strip boards (reading music)
0.024.20 box with cubes for pink tower (exploration of the relationships between adjacent cubes)
0.025.20 box with prisms for brown stair (exploration of the relationship between adjacent prisms)

Age 5½ to 6:

0.039.00 geometric form cards (visual sense, abstraction of the form)
0.040.00 geometric form card cabinet
OR
0.040.A0 geometric form card box
0.043.00 leaf cards (visual sense, abstraction of the form)
0.044.00 leaf cards cabinet
OR
0.040.A0 leaf cards box
5.608.00 geometric cabinet matching cards
5.609.00 geometric cabinet control card
5.610.00 geometric cabinet labels
5.613.00 commands for geometric cabinet
5.615.00 commands for geometric solids

Completeness and Repair of Materials:

0.320.00 first aid kit for sensorial material (replacement pieces)
9.500.00 pink touch-up paint
9.500.10 pink touch-up paint (new pink)
9.501.00 red touch-up paint
9.502.00 yellow touch-up paint
9.503.00 green touch-up paint
9.504.00 dark blue touch-up paint
9.505.00 clear touch-up varnish
9.506.00 thinner for repair paint
9.507.00 brown touch-up paint
9.508.00 black touch-up paint
9.509.00 light blue touch-up paint

Geometry

Geometry builds on the early sensorial experience with both plane and solid geometric shapes. At the elementary level, continued sensorial exploration with geometry materials leads to the abstraction of theorems and formulas. Geometry is closely interrelated with mathematics through its visual representation of the relationships and logic of mathematical processes. It also provides the basis for the study of architecture and design.

Geometry for the Preschool: Activities and Materials Overview

Preschool geometric materials are listed in the Sensorial section.

Geometry for the Elementary: Activities and Materials Overview

1. The Story of Geometry

2. Preliminary Exercises

(Many of these exercises overlap with preschool geometry while others are more advanced.)
0.037.00 geometric cabinet
0.038.00 demonstration tray
0.039.00 geometric form cards
0.039.A0 geometric form cards for the demonstration tray
0.040.A0 geometric form card box
0.045.00 circles, squares, and triangles
0.045.50 inscribed and concentric figures, plastic
0.045.70 inscribed and concentric figures, paper

0.045.A0 detective adjective exercise
0.048.00 geometric solids
0.048.A0 geometric plane figures with box
0.048.B0 geometric solids basket
0.048.C0 geometric cards
0.049.00 constructive triangles
0.049.F0 constructive blue triangles
5.608.00 geometric cabinet matching cards
5.609.00 geometric cabinet control chart
5.610.00 geometric cabinet labels
5.611.00 geometric cabinet advanced triangle labels
5.612.00 detective adjective exercise labels
5.613.00 commands for geometric cabinet
5.615.00 commands for geometric solids
Spirograph™
tangrams

3. Congruent–Similar–Equivalent

A. Concept with Iron Material

0.115.00 metal squares—9 plates
0.116.00 metal triangles—4 plates
1.765.00 fraction cabinet
geometry charts (handmade)
paper
paper strips and scissors or blank tickets (handmade)
pencil

B. Concept with Constructive Triangles

0.049.00 constructive triangles
0.049.F0 constructive blue triangles
geometry charts (handmade)

4. Introduction to Polygons

0.194.00 geometric stick material
0.194.A0 large working board geometric stick material
nomenclature materials (handmade)

5. Angles

0.114.00 fraction circles
0.114.A0 fraction circles stands
0.124.00 instrument for the measurement of angles
0.194.00 geometric stick material
0.194.A0 large working board geometric stick material
1.765.00 fraction cabinet
carpenter's square
compass
nomenclature materials (handmade)
paper:
  plain, large sheets
  regular, 8.5" x 11"
pencils:
  colored (or crayons)
  regular
protractor (full circle)
push pins, different colors
ruler

6. Inscribed and Circumscribed Figures

0.114.00 fraction circles
0.114.A0 fraction circles stands
0.115.00 metal squares—9 plates
0.116.00 metal triangles—4 plates
0.117.00 small triangle
0.117.A0 small trapezoid
0.117.B0 small quatrefoil
0.118.00 inscribed and concentric figures, metal
0.119.00 triangle inscribed in circle
1.765.00 fraction cabinet
paper
pencil
scissors

7. Lines

0.194.00 geometric stick material
0.194.A0 large working board geometric stick material
carpenter's square
child symbols, three pairs (handmade)
food coloring
nomenclature materials (handmade)
transparent jars, large
water

8. Equivalence

0.049.00 constructive triangles
0.122.00 equivalent figure material
0.123.00 Theorem of Pythagoras
1.765.00 fraction cabinet
geometry charts (handmade)
triangles (handmade)

9. Polygons and Circles

A. Polygons

0.049.00 constructive triangles (triangular box)
0.126.00 stand for height (centimeters)
0.126.01 stand for height (inches)
0.194.00 geometric stick material
0.194.A0 large working board geometric stick material
carpenter's square
nomenclature materials (handmade)
plane geometric figures made of paper, different sizes and shapes:
  triangles (handmade)
  quadrilaterals (handmade)
  polygons (handmade)

B. The Circle

0.114.00 fraction circles
0.114.A0 fraction circles stands
0.119.00 triangle inscribed in circle
0.194.00 geometric stick material
0.194.A0 large working board geometric stick material
1.765.00 fraction cabinet
nomenclature materials (handmade)
paper circles of different sizes (handmade)

10. Area

A. Plane Figures

0.122.00 equivalent figure material
0.126.00 stand for height (centimeters)
0.126.01 stand for height (inches)
0.127.00 yellow triangles for area
1.765.00 fraction cabinet

paper
parentheses (handmade)
pencil
prepared tickets (handmade)

B. Circle

0.037.00 geometric cabinet
0.114.00 fraction circles
0.114.A0 fraction circles stands
0.118.00 inscribed and concentric figures, metal
0.119.00 triangle inscribed in a circle
0.194.00 geometric stick material
0.194.A0 large working board geometric stick material
1.765.00 fraction cabinet
carpenter's square
chalk
circles, paper, different sizes (handmade)
newsprint
pencil
prepared tickets (handmade)
rectangles, paper, different sizes (handmade)
ruler (at least 18 inches)

C. Relationship Between Apothem and the Side of a Plane Figure

paper
paper polygons of different types, 3 sizes of each kind, each 10 times larger than the last (handmade)
pencil
ruler

11. Solid Geometry

A. Prisms

0.024.00 pink tower (borrow from preschool)
0.024.20 box with cubes for pink tower
0.025.00 brown stair (borrow from preschool)
0.025.20 box with prisms for brown stair
0.188.01 square-based prism—elementary geometric solids
0.188.02 rhombic-based prism—elementary geometric solids
0.188.03 triangular-based prism—elementary geometric solids
0.188.04 set of 2 triangular-based prisms—elementary geometric solids
0.188.05 hexagonal-based prism—elementary geometric solids
0.188.06 divided hexagonal-based prism—elementary geometric solids
0.188.07 short square-based prism—elementary geometric solids
0.188.08 short triangular-based prism—elementary geometric solids
0.188.A0 volume box with 250 cubes
0.188.B0 five yellow prisms
0.192.00 volume box with 1000 cubes
tickets:
  blank (handmade)
  prepared (handmade)

B. Pyramid

0.128.00 metal volume containers
0.188.09 square-based pyramid—elementary geometric solids
0.188.10 triangular-based pyramid—elementary geometric solids
sand
tickets:
  blank (handmade)
  prepared (handmade)

C. Figures with Circular Bases

0.188.11 cylinder—elementary geometric solids
0.188.12 cone—elementary geometric solids
0.188.13 short cylinder—elementary geometric solids
tickets:
  blank (handmade)
  prepared (handmade)

D. Figures with Curved Surfaces

0.188.14 sphere—elementary geometric solids
0.188.15 ellipsoid—elementary geometric solids
0.188.16 ovoid—elementary geometric solids

E. Solids of Rotation

0.037.00 geometric cabinet
equilateral cylinder—diameter and height the same (handmade)
sand, fine grained
shallow tray

F. Lateral and Total Area of Solids

0.048.00 geometric solids
0.048.B0 geometric solids basket
0.049.00 constructive triangles (4 red equilateral triangles)
chalk
crayon
icosahedron—20-sided polygon (handmade)
newsprint
nomenclature cards for geometric solids (handmade)
pencil
plumb line
pyramid made of straws with corresponding paper triangles (handmade)
ruler, long
yarn

G. Roman Arch

0.350.00 Roman arch

Mathematics

The Montessori math materials are called "materialized abstractions." Through the manipulation of concrete materials at the preschool level, the child internalizes concepts of number, symbol, sequence, the operations of the decimal system, and memorization of basic facts. The materials simultaneously reveal arithmetic, geometric, and algebraic correlations. These correlations are more fully extracted and articulated at the elementary level as the child moves toward abstraction through a series of carefully constructed steps.

Mathematics for the Preschool: Activities and Materials Overview

1. Numbers to Ten

A. Number Rods:

0.027.00 number rods

B. Sandpaper Numerals:

0.028.13 sandpaper numerals, USA style, print
0.028.A0 sandpaper numerals box

C. Number Rods and Cards:

0.027.00 number rods (same as above)
0.033.03 printed numerals, USA style, print
0.033.A0 printed numerals box

D. Spindle Boxes:

0.032.03 spindle boxes, USA style, print
0.032.10 extra spindles, per 10
0.032.B0 loose spindles box
ribbons or rubber bands or hair fasteners

E. Memory Game of Numbers:

5.580.00 numerals 0-10
basket

F. Cards and Counters:

0.033.03 printed figures, USA style, print
0.033.A0 printed numerals box
0.034.01 red counters, 100

G. Number words

5.585.00 number words and numerals 1-10

2. The Decimal System

A. Introduction to 1, 10, 100, 1000:

0.250.G0 introduction to decimal quantity, individual beads, glass
0.251.00 introduction to decimal symbol
large felt mat or work mat

B. Introduction to Beads:

0.252.G0 introduction to the decimal system, individual beads, glass
0.081.00 wooden tray with two unit cups
large felt mat or work mat

C. Introduction to Cards:

0.069.C0 large number cards 1-1000, plastic
0.069.A0 large number cards box

D. Formation of Complex Numbers with Beads and Cards:

0.069.A0 large number cards box
0.072.C0 large number cards 1-9000, plastic
0.081.00 wooden tray with two unit cups
0.252.G0 introduction to the decimal system, individual beads, glass
large felt mat or work mat
bowl

E. Collective Exercises–Changing:

0.074.10 wooden square, per 10 pieces (5)
0.075.10 wooden cube, per 10 pieces
0.076.G0 45 golden ten bars in box, individual beads, glass (3 boxes)
0.077.G0 100 golden unit beads, individual beads, glass, with holes
0.081.00 wooden tray with two unit cups
bowls, 2, for up to 99 unit beads

F. Collective Exercises:

(Order one set of each of the following for a class of 25 children, two sets of each for a class of 35 children.)
0.069.A0 box for large number cards
0.070.A0 box for small number cards (4 for each set)
0.070.C0 small number cards 1-3000, plastic (3 for each set)
0.071.C0 small number cards 1-9000, plastic
0.072.C0 large number cards 1-9000, plastic
0.074.10 wooden square, per 10 pieces (5)
0.075.10 wooden cube, per 10 pieces (2)
0.076.G0 45 golden ten bars in box, individual beads, glass (3 boxes for each set)
0.077.G0 100 golden unit beads, individual beads, glass, with holes
0.081.00 wooden tray with two unit cups (3 for each set)
0.260.00 box with arithmetic signs
5.580.00 numerals 0 to 10, cut to size (2 for each set)
bowls, 2, for up to 50 beads
boxes, plastic, 2, for up to 50 beads
boxes, plastic, 2, for small number cards (5.580.00)
ribbons for division: 18 green bows, 9 blue bows, 9 red bows
trays, 2 large, 9 small

G. The Stamp Game:

0.082.00 stamp game
5.583.00 stamp game paper 15 problems
Note: Choice of quadrille paper depends on manual skill of each child. (Use small numeral cards from the golden bead material if necessary until a child can write the numerals easily and correctly.)

pencil, regular
ruler, 6-inch

H. The Dot Game:

0.050.01 dot exercise, framed board
AND/OR
0.050.50 dot exercise, laminated board
0.050.54 water based pens, black, per 10
marker, washable: another color (not green, blue, or red)
AND/OR
0.050.A0 dot exercise sheets
pencils:
  black
  another color (not green, blue, or red)

I. Word Problems:

Note: These are handmade by each individual teacher.

3. Teens and Tens

A. Teen Boards:

0.030.03 teen boards, USA style, print
0.030.AG teen bead box, individual beads, glass
felt mat

B. Ten Boards:

0.031.03 tens boards, USA style, print
0.031.AG tens bead box, individual beads, glass
felt mat

4. Linear Counting

A. 100 and 1000 Chains:

0.086.B0 set of printed arrows for the bead material with boxes
0.086.G0 bead material, individual beads, glass
0.500.00 bead cabinet castors
1.760.00 bead material cabinet
long mats or "runners" for chains

B. Skip Counting:

0.086.B0 set of printed arrows for the bead material with boxes
0.086.G0 bead material, individual beads, glass
0.500.00 bead cabinet castors
1.760.00 bead material cabinet
long mats or "runners" for chains

5. Memorization

A. Addition:

0.092.00 addition strip board
0.142.A0 addition working charts
0.144.01 addition tables
0.146.00 addition equations and sums box
0.290.G0 addition snake game, individual beads, glass
5.586.00 beginning math paper
5.595.21 addition tables booklet 1, per 40
5.595.22 addition tables booklet 2, per 40
5.595.23 addition tables booklet 3, per 40
5.595.24 addition working charts problem slips
baskets, red rimmed, 5, for problem slips
felt mat for snake game
pencil, regular

B. Subtraction:

0.092.A0 subtraction strip board with strips
0.142.B0 subtraction working charts
0.143.01 subtraction tables
0.147.00 subtraction equations and differences box
0.291.G0 subtraction snake game, individual beads, glass
5.586.00 beginning math paper
5.595.31 subtraction tables booklet 1, per 24
5.595.32 subtraction tables booklet 2, per 24
5.595.33 subtraction tables booklet 3, per 40
5.595.34 subtraction working charts problem slips
baskets, green rimmed, 2, for problem slips
felt mat for snake game
pencil, regular

C. Multiplication:

0.076.G0 45 golden ten bars in box, individual beads, glass (5 boxes)
0.087.00 multiplication board set
0.142.C4 multiplication working charts
0.148.00 box of multiplication equations and products
0.155.01 multiplication tables
0.186.00 table of Pythagoras
0.280.G0 multiplication bead bar layout box, individual beads, glass (2)
5.586.00 beginning math paper
5.595.41 multiplication tables booklet 1, per 40
5.595.42 multiplication tables booklet 2, per 40
5.595.43 multiplication tables booklet 3, per 40
5.595.44 multiplication working charts problem slips
basket, large, for bead bar multiplication
baskets, yellow rimmed, 3, for problem slips
felt mat for multiplication with bead bars
pencil:
  red
  regular

D. Division:

0.096.A0 unit division board
0.142.D1 division working charts
0.149.01 division equations and dividend box
0.158.01 division tables
5.595.50 division tables, per ream
5.595.51 division tables booklets, per 5
5.595.54 division working charts
problem slips
baskets, blue rimmed, 2, for problem slips
cup for 81 beads
pencil, regular
ruler, 6-inch

6. The Passage to Abstraction–Problems

A. Small Bead Frame:

0.093.00 small bead frame
0.153.01 notation paper for the small bead frame (50 sheets)
pencil, regular

B. Large Bead Frame:

0.094.00 large bead frame
0.132.A0 geometric hierarchy of number
0.132.B0 geometric hierarchy number cards
0.154.01 notation paper for the large bead frame (50 sheets)
pencil, regular

C. Division with Racks and Tubes:

0.095.00 long division
0.095.A0 division tube, plastic
0.095.B0 100 green beads with plastic box
0.095.B1 100 blue beads with plastic box
0.095.B2 100 red beads with plastic box
0.097.00 small skittles, per 100
pencil, regular

D. Fractions:

0.097.00 small skittles per 100
0.114.00 fraction circles
0.114.A0 fraction circles stands
0.115.00 metal squares—9 plates (may be displayed on a classroom shelf or on 0.114.A0—order one set for this)
0.116.00 metal triangles—4 plates (may be displayed on a classroom shelf or on 0.114.A0—order one set for this)
5.605.00 fraction labels
5.606.00 fraction problems, series 1
boxes, plastic, 3, for fraction labels
boxes, plastic, 5, for fraction problems
pencil, regular

E. Measurement:

1. Length:
   English measure ruler
   meter stick
   metric ruler
   yardstick
2. Liquid Volume:
   English measure containers
3. Weight:
   9.124.00 10 weights in wooden storage box
   9.129.00 small wooden scale
   bathroom scale in pounds
   brass English-measure weights
4. Temperature:
   thermometer in Fahrenheit
5. Clock:
   3.100.00 clock with movable hands
   3.101.01 clock exercises in box
   clock with gears
   ink pad
   paper
   rubber stamp of clock
6. Money:
   money, real

Mathematics for the Elementary: Activities and Materials Overview

1. Introduction

Great Lesson—The Story of Numbers
charts (handmade)

2. Basic Math

A. Concepts and practice with concepts

1. Decimal System
   0.069.A0 box for large number cards
   0.070.A0 box for small number cards
   0.070.C0 small number cards 1-3000, plastic
   0.071.C0 small number cards 1-9000, plastic
   0.072.C0 large number cards 1-9000, plastic
   0.074.10 wooden squares, per 10 pieces
   0.075.10 wooden cubes, per 10 pieces
   0.076.G0 45 golden bead ten bars in box, individual beads, glass
   0.077.G0 100 golden unit beads, individual beads, glass, with holes
   0.081.00 wooden tray with two unit cups
   0.082.00 stamp game
   5.583.00 stamp game paper 15 problems
   0.050.A0 dot exercise sheets, per 50
   0.093.00 small bead frame
   0.153.01 notation paper for the small bead frame (50 sheets)
   5.584.00 math function command cards
2. Counting
   0.086.B0 set of printed arrows for the bead material with boxes
   0.086.G0 bead material, individual beads, glass
   0.157.00 control chart for the hundred board
   0.180.00 hundred board
   0.500.00 bead cabinet castors
   1.640.00-1.644.00 carpets (1 of each or 5 of one color)
   1.760.00 bead material cabinet
   1.732.00 stand for 5 carpets

3. Early Work: Concepts, Properties, Numeration

A. Numbers to 1,000,000

0.132.A0 geometric hierarchy of numbers
0.132.B0 geometric hierarchy of numbers cards
card material (handmade) in long wicker basket

B. Commutative and Distributive Laws

0.070.A0 box for small number cards (2)
0.071.C0 small number cards 1-9000, plastic (2)
0.074.10 wooden square per 10 pieces (5)
0.075.10 wooden cube per 10 pieces (2)
0.076.G0 45 golden ten bars in box, individual beads, glass (3)

822

0.077.G0 100 golden unit beads, individual beads, glass (with holes) (2)
0.081.00 wooden tray with two unit cups (3)
0.138.B0 number tiles (3)
0.190.G0 decanomial bead bar box, individual beads, glass
0.260.00 box with arithmetic signs (3)
bowl (to hold up to 100 unit beads)
envelopes, small manila
felt mat
paper slips in basket
parentheses (handmade)

C. Multiples

0.086.B0 set of printed arrows for the bead material
0.086.G0 bead material, individual beads, glass
5.600.00 multiple tables (a, b, and control cards)
5.601.00 list of factors tables (c and d)
5.602.00 multiples of numbers tables (2 pads)
0.280.G0 multiplication bead bar layout box, individual beads, glass
1.760.00 bead material cabinet
felt mat
paper, plain
pencils, colored

D. Factors

0.135.00 algebraic peg board
0.136.00 pegs for algebraic peg board
paper
pencil
strips, gray (handmade) in long wicker basket
tickets, white (handmade)
word problems

E. Lowest Common Multiple

0.135.00 algebraic peg board
0.136.00 pegs for algebraic peg board
small white strips in long wicker basket
paper
pencil
word problems (handmade)

F. Greatest Common Factor

0.135.00 algebraic peg board
0.136.00 pegs for algebraic peg board
blank tickets in basket
pencil
strips, gray, in long wicker basket
word problems (handmade)

G. Divisibility

0.074.10 wooden square, per 10 pieces (5)
0.075.10 wooden cube, per 10 pieces (2)
0.076.G0 45 golden ten bars in box, individual beads, glass (3)
0.077.G0 100 golden unit beads, individual beads, glass (with holes) (2)
0.081.00 wooden tray with two unit cups (3)
bowl (to hold up to 100 unit beads)
felt mat
notebook, small
paper
pencil
word problems (handmade)

H. Measurement:

1. History of Measurement—illustrations as necessary
2. Decimal Fraction Board
    0.140.01 decimal fraction board
    tickets (handmade) in container
3. Length
    English-measure ruler
    meter stick
    metric ruler
    yardstick
4. Liquid Volume
    English measure containers
    metric containers (1000 ml, 100 ml, 10 ml)
5. Weight
    9.124.00 10 weights in wooden storage box
    9.129.00 small wooden scale
    bathroom scale in kilograms
    bathroom scale in pounds
    English measure weights, brass
6. Temperature
    thermometers in Celsius
    thermometers in Fahrenheit
7. Clock
    3.100.00 clock with movable hands
    3.101.01 clock exercises
    3.150.00 solaris
    clock with gears
    ink pad
    paper
    rubber stamp of clock
8. Angles
    0.114.00 fraction circles
    0.114.A0 fraction circles stand
    0.124.00 instrument for measurement of angles
    0.125.00 the centisimal frame
    1.765.00 fraction cabinet
9. Money
    money, real, preferably from several different countries
    newspaper—with exchange rates
10. Word Problems, for all measurement categories listed above (handmade)

I. Memorization

1. Addition
    a. Snake Game
        0.290.G0 addition snake game, individual beads, glass
        felt mat
    b. Addition Strip Board With Control Charts I and II
        0.092.00 addition strip board
        0.142.A0 addition working charts (control charts only)
        0.144.01 addition tables
        5.595.21 addition tables booklet 1
        5.595.22 addition tables booklet 2
        5.595.23 addition tables booklet 3

- 5.959.24 addition working charts problem slips
- c. Charts III, IV, V, VI (blank)
  - 0.142.A0 addition working charts (finger charts, blank chart, box of answers)
  - 0.146.00 addition equations and sums box
  - 0.144.01 addition tables
  - 0.280.G0 multiplication bead bar layout box, individual beads, glass
  - 5.586.00 beginning math paper
  - 5.959.24 addition working charts problem slips
  - addition problems, other special cases, tables (handmade)
  - parentheses (handmade)
  - pencil
  - quadrille paper
- 2. Subtraction
  - a. Negative Snake
    - 0.292.G0 elementary negative snake game, individual beads, glass
    - felt mat
  - b. Negative Strip Board
    - 0.092.A0 subtraction strip board
    - 0.143.01 subtraction tables
    - 5.595.31 subtraction tables booklet 1
    - 5.595.32 subtraction tables booklet 2
    - 5.595.33 subtraction tables booklet 3
    - 5.595.34 subtraction working charts problem slips
    - pencil
  - c. Subtraction Charts I and II
    - 0.142.B0 subtraction working charts
    - 0.143.01 subtraction tables
    - 0.280.G0 multiplication bead bar layout box, individual beads, glass
    - 5.586.00 beginning math paper
    - 5.595.34 subtraction working charts problem slips
    - pencil
  - d. Subtraction Chart III (Blank)
    - 0.142.B0 subtraction working charts
    - 0.147.00 subtraction equations and differences box
- 3. Multiplication
  - a. With Bead Bars
    - 0.076.G0 45 golden ten bars in box, individual beads, glass
    - 0.186.00 table of Pythagoras
    - 0.191.00 decanomial paper
    - 0.280.G0 multiplication bead bar layout box, individual beads, glass
    - felt cloth, yellow
    - numerical decanomial (handmade) in envelopes
  - b. Multiplication Board
    - 0.087.00 multiplication board set
    - 0.142.C4 multiplication working charts
    - 0.155.01 multiplication tables
    - 5.595.41 multiplication tables booklet 1
    - 5.595.42 multiplication tables booklet 2
    - 5.595.43 multiplication tables booklet 3
    - 5.595.44 multiplication work charts problem slips
    - pencil
  - c. Multiplication Charts III, IV and V (blank)
    - 0.142.C4 multiplication working charts
    - 0.148.00 box of multiplication equations and products
    - 0.155.01 multiplication tables
    - 0.157.A0 control chart for the Pythagoras board
    - 0.181.00 Pythagoras board
    - 5.586.00 beginning math paper
    - 5.595.41 multiplication tables booklet 1
    - 5.595.42 multiplication tables booklet 2
    - 5.595.43 multiplication tables booklet 3
    - 5.595.44 multiplication work charts problem slips
    - parentheses (handmade)
    - pencil
    - tickets for changing 1st control chart to 2nd (handmade)
    - quadrille paper
- 4. Division
  - a. Unit Division Board
    - 0.096.A0 unit division board
    - 0.158.01 division tables
    - 5.595.50 division tables per ream
    - 5.595.51 division tables booklet
    - 5.595.54 division working charts problem slips
    - cup (to hold 81 beads)
    - paper for dividend, divisor, quotient, remainder
    - pencils:
      - red
      - regular
  - b. Division Chart I and II
    - 0.142.D1 division working charts
    - 0.149.01 division equations and dividends box
    - 0.158.01 division tables
    - 5.595.50 division tables per ream
    - 5.595.51 division tables booklet
    - 5.595.54 division working charts problem slips
    - pencil
    - quadrille paper

4. Operations: First Work

A. Long Multiplication

- 1. Large Bead Frame
  - 0.094.00 large bead frame
  - 0.154.01 notation paper for the large bead frame (50 sheets)
  - pencils:
    - red
    - regular
- 2. Flat Bead Frame
  - 0.099.00 flat bead frame
  - 0.138.B0 number tiles
  - 7.701.00 scissors with rounded point 10 cm
  - OR
  - 7.702.00 scissors with sharp point 13 cm
  - 7.708.00 six-scissor storage block
  - paper, regular
  - pencil

white strips of paper in long wicker basket

3. Bank Game
    - 0.073.00 bank game
    - 0.138.B0 number tiles
    - gray cards with double zero (handmade)
4. Checkerboard
    - 0.137.01 checkerboard
    - 0.138.B0 number tiles
    - paper:
        - graph
        - plain
    - pencils:
        - colored (green, blue, red)
        - regular
    - straightedge

B. Long Division

1. Long Division Material
    - 0.095.00 long division
    - 0.095.A0 division tube (plastic)
    - 0.095.B0 100 green beads with plastic box (for replacements)
    - 0.095.B1 100 blue beads with plastic box (for replacements)
    - 0.095.B2 100 red beads with plastic box (for replacements)
    - paper:
        - graph
        - plain
    - pencil
2. Stamp Exercise
    - 0.082.00 stamp game
    - cardboard, strips, in long wicker basket
    - pencil
    - ruler
    - tickets, blank
    - quadrille paper

C. Squares and Cubes of Numbers

- 0.086.G0 bead material, individual beads, glass
- 0.280.G0 multiplication bead bar layout box, individual beads, glass (2)
- 1.760.00 bead material cabinet
- envelopes, 10, containing labeled squares and rectangles for numerical decanomial (handmade)
- felt mat
- paper:
    - graph (8.5" x 11" and 22" x 28")
    - plain
- pencils:
    - colored
    - regular
- tickets, blank

5. Fractions

- 0.097.00 small skittles
- 0.113.00 large fraction skittles
- 0.113.A0 skittle stand
- 0.114.00 fraction circles
- 0.114.A0 fraction circles stand
- 0.124.00 instrument for the measurement of angles
- 0.135.00 algebraic peg board
- 0.136.00 pegs for algebraic peg board
- 0.185.00 cut-out labeled fraction circles
- 1.765.00 fraction cabinet
- 5.605.00 fraction labels
- 5.606.00 fraction problems, series 1
- 5.607.10 fraction equivalence research sheets
- fraction charts (handmade)
- marker, black, that will mark on plastic
- paper:
    - graph
    - plain
- pencil
- plastic, clear, for making grids
- problems (handmade) (in pull drawer cabinet):
    - other problems
    - word problems
- straightedge
- strips, black, of cardboard in long wicker basket
- tickets, blank, or white strips of paper and scissors in basket

6. Decimal Fractions

- 0.073.00 bank game (cards from)
- 0.097.00 small skittles
- 0.114.00 fraction circles
- 0.114.A0 fraction circles stand
- 0.125.00 the centisimal frame
- 0.138.B0 number tiles
- 0.138.G0 checker board beads, individual beads, glass
- 0.139.01 decimal fraction exercise
- 0.140.01 decimal fraction board (yellow decimal board)
- 0.182.01 decimal checker board
- 1.765.00 fraction cabinet
- "candelabra" (handmade)
- "crown" (handmade)
- felt mat
- felt squares
- fraction strips, 3 (handmade)
- paper:
    - graph
    - plain
- pencil
- paper discs, small, black (handmade)
- "propeller" (handmade)
- tickets, blank, or strips of white paper and scissors in long wicker basket
- zero cards, gray decimal (handmade)

7. Operations Continued

A. Squaring

- 0.060.A3 small movable alphabet, red, print
- 0.060.A5 small movable alphabet, blue, print
- 0.060.A7 small movable alphabet, black, print
- 0.060.C2 box for the small movable alphabet (3)
- 0.073.00 bank game
- 0.074.10 wooden square per 10 pieces (5)
- 0.075.10 wooden cube per 10 pieces (2)
- 0.076.G0 45 golden ten bars in box, individual beads, glass (3)

0.077.G0 100 golden unit beads, individual beads, glass (with holes) (2)
0.081.00 wooden tray with two unit cups (3)
0.086.G0 bead material, individual beads, glass (bead squares)
0.095.B0 100 green beads with plastic box
0.095.B1 100 blue beads with plastic box
0.095.B2 100 red beads with plastic box
0.133.00 small square root board
0.134.01 patterns for square root
0.135.00 algebraic peg board
0.136.00 pegs for algebraic peg board
0.138.G0 number tiles
0.260.00 box with arithmetic signs
1.760.00 bead material cabinet
5.604.00 one hundred circle paper
felt mat
graph paper
pencils:
  colored
  regular
rubber bands, colored
tickets, blank

B. Cubing

0.086.G0 bead material, individual beads, glass
0.131.00 binomial cube
0.132.00 trinomial cube
0.138.G0 checker board beads, individual beads, glass
0.187.00 arithmetic trinomial cube
0.189.00 cubing material
1.760.00 bead material cabinet
felt mat
paper
pencil
tickets, blank, or strips of paper and scissors
tickets/labels (handmade)

C. Square Root

0.074.10 wooden square, per 10 pieces
0.076.G0 45 golden ten bars in box, individual beads, glass
0.077.G0 100 golden unit beads, individual beads, glass (with holes)
0.086.G0 bead material, individual beads, glass
0.095.B0 100 green beads with plastic box
0.133.00 small square root board
0.134.01 patterns for square root
0.135.00 peg board
0.136.00 pegs for algebraic peg board
1.760.00 bead material cabinet
chart for square root (handmade)
cup for the green beads
felt mat
paper:
  thin strips in container
  regular
pencil

D. Cube Root

0.187.00 arithmetic trinomial cube
0.188.A0 volume box with 250 cubes
0.189.00 cubing material
0.192.00 volume box with 1000 cubes
chart for cube root (handmade)
felt mat
paper
pencil

8. Negative Numbers

0.097.00 small skittles per 100
0.280.G0 multiplication bead bar layout box, individual beads, glass
0.292.G0 elementary negative snake game, individual beads, glass
cups, plastic, labeled with the negative sign
felt mat
paper
parentheses (handmade) in container
pencil
tickets, blank, or white strips of paper and scissors in long wicker basket

9. Powers of Numbers

0.130.00 power of two cube
0.132.A0 geometric hierarchy of numbers
0.189.00 cubing material
0.192.00 volume box with 1000 cubes
problem tickets (handmade)
strips from the decimal board (handmade)
tickets, blank, or white strips of paper and scissors in long wicker basket

10. Other Base Systems

0.086.G0 bead material, individual beads, glass (bead squares and cubes)
0.095.B0 100 green beads with plastic box
0.280.G0 multiplication bead bar layout box, individual beads, glass
1.760.00 bead material cabinet
boards for other base systems, 2 (handmade)

11. Word Problems

This section includes word problems that are not included in other areas of the mathematics curriculum.

A. Distance, Velocity, Time

labels/tickets (handmade) in container

B. Percent, Interest

0.074.10 wooden square per 10 pieces (5)
0.075.10 wooden cube per 10 pieces (2)
0.076.G0 45 golden ten bars in box, individual beads, glass
0.077.G0 100 golden unit beads, individual beads, glass (with holes) (2)
0.081.00 wooden tray with two unit cups (3)
0.097.00 small skittles per 100 (green)
bowl (to hold up to 100 unit beads)
chalk

12. Introduction to Algebra

A. Ratio

0.280.G0 multiplication bead bar layout box, individual beads, glass
geography stamps
labels/tickets (handmade)
objects in the environment
word problems (handmade)

B. Proportion

0.086.G0 bead material, individual beads, glass
0.114.00 fraction circles
0.114.A0 fraction circles stand
0.115.00 metal squares—9 plates
0.116.00 metal triangles—4 plates
0.130.00 power of two cube
0.135.00 algebraic peg board
0.136.00 pegs for algebraic peg board
0.190.G0 decanomial bead bar box, individual beads, glass
0.260.00 box with arithmetic signs
1.760.00 bead material cabinet
charts (handmade):
  garden
  water tank
felt mat
geography stamps
parentheses (handmade)
prepared tickets (handmade)
strips, cardboard (handmade) in long wicker basket
word problems (handmade)

Language

Language is interwoven throughout all aspects of the curriculum. Specific language activities include oral language, written expression, and reading. The preschool child builds upon oral language to discover the relationship between sound and symbol. This discovery enables the child to make his or her own thoughts visible (writing) and to decipher the thoughts of others (reading). Further activities spark conscious awareness of the order and function of words in the child's native language. The elementary child discovers the powerful role of written language in the development of human civilization. Language becomes a major tool for both exploration and expression through research and oral and written presentations. Continued study of grammar and syntax is integrated with the study of literature and style.

Language for the Preschool: Activities and Materials Overview

1. Expansion of Language

A. Enrichment of Vocabulary–Spoken Language:

(Parallel activities; no special order)
1. Objects in the environment
2. Sensorial apparatus (qualities)
   5.659.00 positive, comparative, superlative (This written form comes later.)
3. Classified cards:
   5.634.00 phonetic pictures and labels

B. Language Training:

(Parallel activities; no special order)
1. Storytelling (true information)
2. Poetry
3. Self-expression
4. The Question Game

2. Writing

A. Sound Games

objects in the environment

B. Sandpaper Letters

Note: Other styles are available. For North America there is also a Spanish-style alphabet. Other styles are available in Europe. Each class should order the style that is the most appropriate for its children.

0.054.B4 sandpaper letters, cursive
0.054.AO box for the sandpaper letters
0.056.A0 box for the double sandpaper letters
0.056.B4 double sandpaper letters, cursive
0.057.A0 box for the sandpaper capitals
0.057.B4 sandpaper capitals, cursive
5.632.00 alphabet cards
setup for preparing fingertips:
  1 tray
  1 small bowl
  a supply of small terrycloth towels
  1 small pitcher
sandpaper letters grouped according to similarity of beginning stroke on a green lined background which shows placement on a line
double sandpaper letters which shows joining of letters

C. Movable Alphabet

0.058.00 wooden boards
0:059.A3 large movable alphabet, print
0.059.A4 large movable alphabet, cursive
0.059.C1 box for the large movable alphabet, cursive
0.059.C3 box for the large movable alphabet, print
1.640.00-1.644.00 carpets in 5 colors
1.732.00 stand for 5 carpets
OR
1.731.00 stand for 3 carpets

D. Metal Insets

0.046.00 metal insets
0.047.00 metal insets stands
1.730.00 wall frame for metal insets
5.679.00 inset paper bulk white, 6 reams
7.023.00 paper box for 14 x 14 cm paper (5.5" x 5.5")
7.201.00 11 dozen inset pencils (11 colors)
7.202.00 dozen red inset pencils
7.203.00 dozen dark blue inset pencils
7.204.00 dozen dark green inset pencils
7.211.00 dozen black inset pencils
7.304.00 holder for 3 pencils
7.305.00 set of 11 colored pencil holders
9.157.00 rubber desktop pad 5.5" x 5.5" (14 x 14 cm) (backing for metal inset paper)
cardboard or posterboard cut to same size as metal inset frame
supply of paper in pastel colors 5.5" x 5.5"
trays

E. Small Metal Insets:

0.115.00 metal squares—9 plates (may be displayed on a classroom shelf or on 0.114.A0—order one set for this)
0.116.00 metal triangles—4 plates (may be displayed on a classroom shelf or on 0.114.A0—order one set for this)
compass
paper, 8.5" x 11"
pencils:
  colored
  regular
protractor
ruler

F. Handwriting:

0.054.A0 box for the sandpaper letters
0.054.B4 sandpaper letters, cursive
0.059.A4 large movable alphabet, cursive, without box
0.059.C1 box for the large movable alphabet, cursive
0.066.00 blank greenboard
0.067.00 greenboard, with lines and squares
0.068.00 greenboard, double lined/squares
1.735.00 stand for greenboards
5.660.00-5.665.00 writing paper blue lined
5.668.00-5.669.00 writing paper green lined
chalkboard, preferably at a slant, on the wall
double sandpaper letters
pencils
sandpaper letters grouped according to similarity of beginning stroke on a green-lined background which shows placement on a line

3. Reading I

A. Phonetic Object Game

box containing objects whose names are phonetic (change regularly) (available from Montessori Services; see Appendix 4 for contact information)
box containing printed tickets for the objects object box labels
pencil
slips of paper

B. Phonetic Reading

5.633.00 phonetic flash cards
5.634.00 phonetic pictures and labels
5.635.00 phonetic reading cards
5.649.10 first books

C. Phonograms

5.637.00 phonogram booklets
5.638.00 phonogram cards
5.639.00 key spelling sorting cards
5.649.10 first books
0.060.A3 small movable alphabet, red, print
0.060.A5 small movable alphabet, blue, print
0.060.A7 small movable alphabet, black, print
0.060.C2 box for the small movable alphabets (3)
box for labels
box of phonetic objects with one not-phonetic object
object box labels
pencil
slips of paper

4. Reading II

A. Word Study

charts with printed lists of words:
1. suffixes
2. prefixes
3. word families
4. compound words

movable alphabets, two small, each a different color

B. Puzzle Words

0.060.A7 small movable alphabet, black, print
0.060.C2 box for the small movable alphabet
5.648.00 puzzle words
boxes or baskets

C. Reading Classification

5.634.00 phonetic pictures and labels
5.659.00 positive, comparative, superlative
labels for Montessori apparatus
labels for indoor environment

D. First Books

5.649.10 first books
5.650.00 easy reading booklets
5.651.00 illustrated poems

5. Functions of Words

Grammar symbols for the functions of words include plastic symbols for manipulative work and paper symbols for symbolizing children's writing.

0.110.A0 noun symbol, plastic
0.110.B0 article symbol, plastic
0.110.C0 adjective symbol, plastic
0.110.E0 verb symbol, plastic
0.110.F0 preposition symbol, plastic
0.110.G0 adverb symbol, plastic
0.110.I0 conjunction symbol, plastic
0.111.A0 noun symbol, paper
0.111.B0 article symbol, paper
0.111.C0 adjective symbol, paper
0.111.E0 verb symbol, paper
0.111.F0 preposition symbol, paper
0.111.G0 adverb symbol, paper
0.111.I0 conjunction symbol, paper

The grammar symbols are housed in their appropriate boxes:

0.112.A0 grammar symbols box, 10 compartments

A. Noun

0.249.00 the farm
1.725.00 farm table
5.657.00 noun labels for the farm

B. Article

5.655.00 grammar games set 1
box of small articles
box with printed tickets
pencil
slips of paper

C. Adjective

5.658.00 adjective labels for the farm
box of printed slips describing each object
grammar symbols in box (see above)
objects related to each other (e.g., farm)
pencil
scissors
slips of paper

D. The Logical Adjective Game

box
card material (handmade)
grammar symbols in box

E. The Detective Adjective Game

0.045.A0 detective adjective exercise
grammar symbols in box
paper
pencil

F. Conjunction

5.655.00 grammar games set 1
5.656.00 conjunctions and prepositions
objects, 3 or 4, having a relationship with one another
farm
grammar symbols in box
ribbon
pencils, red and black
printed tickets
slips of paper

G. Preposition

5.655.00 grammar games set 1
5.656.00 conjunctions and prepositions
objects, 3, having a relationship with one another
box or vase
farm
grammar symbols in box (see above)
prepared tickets (have several different sets)
red and black pencils
ribbon
slips of paper

H. Verb

5.653.00 simple commands set 1
5.654.00 simple commands set 2
boxes (2)
farm
grammar symbols in box
pencil
slips of paper

I. Adverb

adverbial commands (handmade) (supply of commands for changing the contents of the box)
grammar symbols in box
pencil
slips of paper

J. The Logical Adverb Game

box
card material (handmade)
grammar symbols in box

K. Continuation of Commands

grammar symbols in box
slips of paper
commands

6. Reading Analysis

A. Simple Sentences

7.701.00 scissors with rounded point 10 cm
7.708.00 six-scissor storage block
box
chart of prepared sentences
paper arrows:
  black
  red
pencil
printed sentence slips chosen from good authors, giving the child the possibility of interpretation
slips of paper

B. Simple Sentences–Stage of Arrows with Questions

0.108.A1 reading analysis, first chart and box
circles, unmarked:
  large red
  medium black
  small black

C. Simple Sentences with Extensions

0.108.01 reading/sentence analysis set
two sets of printed sentences (1 for control) (handmade)

D. Simple Sentences–Attributes and Appositives

0.108.01 reading/sentence analysis set
two sets of printed sentences (1 for control) (handmade)

Language for the Elementary: Activities and Materials Overview

1. History of Language

A. Written Language

Great Lesson: The Story of Communication in Signs. Includes pre-alphabetical signs, the alphabet, development of different "hands," development of the printing press, etc.
charts (handmade)
other materials at teacher's discretion and choice

B. Spoken Language

1. Theories of the beginning of speech (in story form)
2. The development of languages throughout the ages to present-day English

charts (handmade)

2. Basic Language

A. Phonetic Words

5.633.00 phonetic flash cards
5.634.00 phonetic pictures and labels, print (group into classified sets)
5.635.00 phonetic reading cards

B. Phonograms

5.637.00 phonogram booklets
5.638.00 phonogram cards
5.639.00 key spelling sorting cards

C. Puzzle Words

5.648.00 puzzle words

D. Early Reading

5.649.10 first books
5.650.00 easy reading booklets
5.651.00 illustrated poems
5.653.00 simple commands set 1
5.654.00 simple commands set 2
labels for Montessori apparatus
labels for the indoor environment

3. Grammar and Syntax

A. Word Study

1. Affixes
   a. Suffixes
      0.060.A3 small movable alphabet, red, print
      0.060.A5 small movable alphabet, blue, print
      0.060.A7 small movable alphabet, black, print
      0.060.C2 box for the small movable alphabet (3)
      7.201.00 11 dozen inset pencils (11 colors)
      7.304.00 holders for 3 pencils
      7.305.00 set of 11 colored pencil holders
      charts (handmade)
      colored inks
      dictionaries
      grammar books—for upper elementary work
   b. Prefixes
      0.060.A3 small movable alphabet, red, print
      0.060.A5 small movable alphabet, blue, print
      0.060.A7 small movable alphabet, black, print
      0.060.C2 box for the small movable alphabet (3)
      7.201.00 11 dozen inset pencils (11 colors)
      7.304.00 holders for 3 pencils
      7.305.00 set of 11 colored pencil holders
      chart (handmade)
      colored inks
      dictionaries
      grammar books—for upper elementary work
2. Compound Words
   0.060.A3 small movable alphabet, red, print
   0.060.A5 small movable alphabet, blue, print
   0.060.A7 small movable alphabet, black, print
   0.060.C2 box for the small movable alphabet (3)
   7.201.00 11 dozen inset pencils (11 colors)
   7.304.00 holders for 3 pencils
   7.305.00 set of 11 colored pencil holders
   chart (handmade)
   collection of objects (i.e., different types of boxes)
   colored inks
   dictionaries
   grammar books—for upper elementary work
3. Word Families
   0.060.A3 small movable alphabet, red, print
   0.060.A5 small movable alphabet, blue, print
   0.060.A7 small movable alphabet, black, print
   0.060.C2 box for the small movable alphabet (3)
   7.201.00 11 dozen inset pencils (11 colors)
   7.304.00 holders for 3 pencils
   7.305.00 set of 11 colored pencil holders
   chart (handmade)
   colored inks
   dictionaries
   grammar books—for upper elementary work
4. Synonyms (after verb grammar box)
   verb command cards
5. Antonyms
6. Homonyms
7. Possessives
8. Contractions
9. Abbreviations

B. Parts of Speech

General plan of work includes: oral commands, grammar boxes, printed commands, classification charts and work, more details about grammar, composition, research, grammar books. Note that the numerical symbol (0.110.D0) is for languages other than English.

The durability of plastic grammar symbols makes them ideal for use with the grammar boxes. The paper grammar symbols are for the children's own work. In addition, extra grammar symbols should be ordered for the parts of speech most frequently used in the children's work.

The first set of material for the grammar box work includes:

0.102.01 grammar boxes
0.103.01 grammar filling boxes
0.104.01 printed grammar cards
0.104.A0 unprinted grammar cards
0.105.A1 grammar command boxes
0.110.A0 noun symbol, plastic
0.110.B0 article symbol, plastic
0.110.C0 adjective symbol, plastic
0.110.E0 verb symbol, plastic
0.110.F0 preposition symbol, plastic
0.110.G0 adverb symbol, plastic
0.110.H0 pronoun symbol, plastic
0.110.I0 conjunction symbol, plastic
0.110.J0 interjection symbol, plastic
0.110.50 noun and verb introduction solids
0.111.A0 noun symbol, paper
0.111.B0 article symbol, paper
0.111.C0 adjective symbol, paper
0.111.E0 verb symbol, paper
0.111.F0 preposition symbol, paper
0.111.G0 adverb symbol, paper
0.111.H0 pronoun symbol, paper
0.111.I0 conjunction symbol, paper
0.111.J0 interjection symbol, paper
0.112.A0 grammar symbols box with 10 compartments (one for the plastic symbols and another for the paper symbols)

1. Noun
   0.102.01 article-noun grammar box
   0.103.01 noun filling boxes
   0.110.50 noun and verb introduction solids (noun only)
   5.655.00 grammar games, set 1
   5.657.00 noun labels for the farm
   5.680.00 classification of nouns chart
   booklets for plurals (handmade)
   card materials (handmade)
   collection of objects of the same kind
   grammar books—for upper elementary work
   plastic grammar symbols in 10-compartment box
   paper grammar symbols in 10-compartment box
2. Adjective
   0.045.A0 detective adjective triangle exercise
   0.102.01 adjective grammar box
   0.103.01 adjective filling boxes
   0.110.50 noun and verb introduction solids
   5.612.00 detective adjective exercise labels
   5.655.00 grammar games, set 1
   5.658.00 adjective labels for the farm (for beginning readers)
   5.659.00 positive, comparative, superlative
   5.681.00 classification of adjective chart
   card material (handmade)
   grammar books—for upper elementary work
   plastic grammar symbols in 10 compartment box
   paper grammar symbols in 10 compartment box
3. Verb
   0.102.01 verb grammar box
   0.103.01 verb filling boxes
   0.110.50 noun and verb introduction solids
   charts (handmade)
   commands (handmade)
   grammar books—for upper elementary work
   plastic grammar symbols in 10-compartment box
   paper grammar symbols in 10-compartment box
4. Preposition
   0.102.01 preposition grammar box
   0.103.01 preposition filling boxes
   5.656.00 conjunctions and prepositions
   grammar books—for upper elementary work
   plastic grammar symbols in 10-compartment box
   paper grammar symbols in 10-compartment box
5. Adverb
   0.102.01 adverb grammar box
   0.103.01 adverb filling boxes
   grammar books—for upper elementary work
   plastic grammar symbols in 10-compartment box
   paper grammar symbols in 10-compartment box
6. Pronoun
   0.102.01 pronoun grammar box
   0.103.01 pronoun filling boxes
   charts (handmade)
   card material (handmade)
   grammar books—for upper elementary work
   plastic grammar symbols in 10-compartment box
   paper grammar symbols in 10-compartment box
7. Conjunction
   0.102.01 conjunction grammar box
   0.103.01 conjunction filling boxes
   5.656.00 conjunctions and prepositions
   card material (handmade)
   grammar books—for upper elementary work
   plastic grammar symbols in 10-compartment box
   paper grammar symbols in 10-compartment box
8. Interjection
   0.102.01 interjection grammar box
   0.103.01 interjection filling boxes
   grammar books—for upper elementary work
   plastic grammar symbols in 10-compartment box
   paper grammar symbols in 10-compartment box
9. Aspects of the Verb
   card material (handmade)
   charts (handmade)
   grammar books
10. Summary Exercises
    5.680.00 classification of nouns chart
    5.681.00 classification of adjectives chart
11. More Details in the Grammar Work / Further Analysis of the Parts of Speech
    Symbolic materials used to go into more detail in the grammar work include:

0.110.00 plastic grammar symbols in box (for work with grammar boxes)
0.111.00 paper grammar symbols, replacement set (for children's own work)
0.112.50 paper grammar symbols in box

C. Reading Analysis

General materials for sentence analysis include:
0.108.01 reading/sentence analysis set
0.108.B1 reading analysis working chart

1. Simple Sentences
   0.108.01 reading/sentence analysis set (box two and box three)
   0.108.B1 reading analysis working chart
   grammar books
2. Compound Sentences
   paper
   pencils (regular and red)
   scissors
   small labels (handmade)
3. Complex Sentences
   analysis chart B (handmade)
   analysis chart C (handmade)
   clause boxes 1 and 2 (handmade)
   paper
   pencil
   scissors
   small labels (handmade)

4. Written Language (Composition)

A. Free Expression

1. Imaginative
2. Factual (history, geography, biology, music, art, etc.)
3. Descriptive

B. Practice

1. Form and Content
2. Punctuation
3. Spelling
4. Capitalization
5. Handwriting
   0.046.00 metal insets
   0.047.00 metal inset stands
   0.066.00 blank greenboards
   0.067.00 greenboards with lines and squares
   0.068.00 greenboards, double lined/squares
   1.735.00 stand for greenboards
   5.660.00 writing paper blue lined, 2" x 8.5"
   5.661.00 writing paper blue lined, 4" x 8.5"
   5.662.00 writing paper blue lined, 4.25" x 5.5"
   5.663.00 writing paper blue lined, 2.75" x 7"
   5.664.00 writing paper blue lined, 7" x 8.5"
   5.665.00 writing paper blue lined, 8.5" x 11"
   5.668.00 writing paper green lined, 7" x 8.5"
   5.669.00 writing paper green lined, 8.5" x 11"
   5.679.00 inset paper bulk 6 reams
   7.023.00 box for 14 x 14 cm (5.5" x 5.5") paper
   7.201.00 11 dozen inset pencils, 11 colors
   7.202.00 dozen red inset pencils
   7.203.00 dozen dark blue inset pencils
   7.204.00 dozen dark green inset pencils
   7.211.00 dozen black inset pencils
   7.304.00 holder for 3 pencils
   7.305.00 set of 11 colored pencil holders
   colored inks
   feather quills
   ink blotter, small
   pencils, regular
   pen holders and nibs
   pen wipers
   pens
6. Illustration and Decoration

C. Functional Cursive Writing

D. Taking Notes

E. Written Reports

F. Letter Writing

G. Diary

H. Journal

I. Poetry

J. Drama

K. Dialogue

0.061.T0 printed alphabet, blue, print
0.061.T2 printed alphabet, red, print
0.061.C1 box for the printed alphabet, print (2)

L. Essay

M. Biography

N. Autobiography

O. Editing

5. Spoken Language

A. Speeches

B. Debates

C. Discussion

D. Reports

E. Recitation

F. Dialogue

G. Drama

6. Literature

A. Articles and Books–read by the children silently

1. Class library
2. Public library

B. Stories and Poetry Read by the Teacher

C. Biographies of Writers

D. Literature Time Lines

E. The History of English Literature

F. The History of American Literature

G. The History of Children's Literature

7. Style

Materials used for the study of style have already been listed above, under the parts of speech work. The materials include:

0.110.00 plastic grammar symbols in box
0.112.50 paper grammar symbols in box

A. Child's Own Writing

B. Writing of Others

C. Comparison of Style

D. Recognition of Style

8. Interpretive Reading

All materials for interpretive reading are handmade by the teacher.

9. Research

A. Skills for Researching

B. History of Languages

C. History of Writing

D. History of Literature

NOTE: All above go parallel.

10. Miscellaneous

A. Study of Paragraphs (main idea, topic sentence, supporting details, etc.)

B. Story Grammar

C. Literary Phrases (idioms, colloquialisms, metaphors, similes)

D. Other Materials (not listed above but frequently needed):

7.701.00 scissors with rounded point 10 cm
AND/OR
7.702.00 scissors with sharp point 13 cm
7.708.00 six-scissor storage block (2)
boxes, clear plastic (for handmade card material)
small trays as necessary
strips of paper or adding machine tape

Science (Physical and Life Sciences) and Social Studies (Geography, History, Anthropology)

An ecological perspective highlights the interrelationships of the earth, its flora and fauna, and human life. The preschool child orders simple classifications of non-organic and organic forms and identifies basic parts of plants and animals. The young child discovers the richly varied way in which people meet the same basic needs in relation to differences in topography, climate, and natural resources. This study is expanded at the elementary level to explore the relationships among living and non-living elements, with a focus on connections and functions. The evolution of human societies is examined as part of the whole unfolding of life on earth.

History for the Elementary: Activities and Materials Overview

1. Natural History

A. The Black Strip

dowel
strip, black (handmade)

B. Clock of the Eras

chart (handmade)

C. Timeline of Life

impressionistic charts
fossils
timeline (hand colored):
  blank chart
  full chart
  separate pictures and labels

2. The Linear Measurement of Time

A. The Clock

3.100.00 clock with movable hands
3.101.01 clock exercise in box
3.150.00 solaris
globe
paper:
  5.5" x 5.5"
  roll (adding machine tape)
pencils:
  colored
  regular
rubber stamp of clock
wooden materials for telling time (overlaps with preschool)

B. Days of the Week

5.541.00 naming days and months

C. Months of the Year

5.541.00 naming days and months
calendar, blank (17" x 22")
blank calendar sheets in three sizes, one page per day
light source
twelve months on one long strip (handmade)
twelve individual months (handmade)

D. Class Diary

calendar, blank (17" x 22")
paper
pencil

E. History of Children's Names

books that give history and meaning of names such as "What to Name the Baby"
tickets (handmade)

F. Personal Timelines

glue
paper:
  blank
  large sheets
  one-inch strips cut from lined paper
pencils
photographs
quadrille paper

G. The B.C. and A.D. Timeline

adding machine tape
pencils:
  colored
  regular
symbol for division between B.C. & A.D. (or B.C.E. & C.E.)

3. Pre-History

A. The Hand Chart

artifacts
strip, black (handmade)

B. The First Timeline of Human Beings

artifacts
books
pictures

C. Fundamental Needs Charts

impressionistic charts
nomenclature materials (handmade)

D. Second Timeline of Human Beings

artifacts

E. History Question Charts

card material for one culture (handmade)
charts

4. Written History

A. The Growth of Culture

impressionistic charts (migration charts)
pictures

B. Study of Other Civilizations

artifacts

C. Study of Child's Own Civilization

American history timeline
blank chart
full chart
movable pieces
artifacts
black strip (handmade)
cards for history question charts
Original Americans chart (handmade)

Geography for the Preschool: Activities and Materials Overview

1. Land and Water Forms

A. Sandpaper Globe

0.230.00 globe of land and water

B. Land and Water Form Models

developing trays, 5" x 7"
drying cloth
food coloring, blue
spoon
pitcher
clay or plasticine
oilcloth

C. Land and Water Form Cards

5.500.00 land and water forms, cards

D. Land and Water Form Pictures

picture collections:
  islands
  lakes

peninsulas
gulfs
isthmi
straits
capes
bays
archipelagos
systems of lakes

E. Outline and Waterways Maps

1.626.00 cabinet for paper maps
5.508.00 world maps 11" x 17"—outlines only
5.514.00 Africa outline
5.515.00 Africa waterways
5.517.00 Asia outline
5.518.00 Asia waterways
5.520.00 Australia outline
5.521.00 Australia waterways
5.523.00 Europe outline
5.524.00 Europe waterways
5.526.00 North America outline
5.527.00 North America waterways
5.529.00 South America outline
5.530.00 South America waterways
5.532.00 U.S.A. map outline
5.533.00 U.S.A. map waterways
pencils, colored:
  red
  blue

F. World Maps with Land and Water Forms Marked

1.626.00 cabinet for paper maps

Mark the physical features of the world (islands, lakes, peninsulas, gulfs, isthmi, straits, capes, bays, archipelagos, system of lakes) on two each of the following maps. Label one of each map with the proper names of the land and water forms (e.g., Cape of Good Hope) and make a set of labels:

5.508.00 world maps 11" x 17"—outlines only
5.510.00 world maps 11" x 17"—political boundaries with lakes

G. Land and Water Form Definition Booklets and Cards

5.500.00 land and water forms, cards
5.501.00 land and water forms, descriptions

H. Land and Water Form Command Cards and Labels

5.502.00 land and water forms, command cards 1
5.503.00 land and water forms, labels
5.504.00 land and water forms, command cards 2

2. Political Geography

A. Colored Globe

0.231.00 globe of the world parts

B. Political Maps and Labels

0.176.A0 puzzle maps stand (or 1.740.00 puzzle maps cabinet)
0.176.B0 puzzle map of Europe
0.176.C0 puzzle map of North America
0.176.E0 puzzle map of South America
0.176.F0 puzzle map of Africa
0.176.G0 puzzle map of Asia
0.176.H0 puzzle map of Australia
0.177.00 puzzle map of the world parts
0.235.01 cards of the world parts
0.236.00 puzzle map of USA
0.236.B0 puzzle map of Mexico
0.237.00 puzzle map of Canada
1.740.00 puzzle map cabinet (or 0.176.A0 puzzle maps stand)
5.509.00 world maps 11" x 17"—political boundaries
5.511.00 hemisphere maps and labels set
5.512.00 world unlabeled control map
5.512.10 world labeled control map
5.516.00 Africa political
5.519.00 Asia political
5.522.00 Australia political
5.525.00 Europe political
5.528.00 North America political
5.531.00 South America political
5.534.00 U.S.A. map—state boundaries
5.544.00 Africa labeled control map
5.545.00 Asia labeled control map
5.546.00 Australia labeled control map
5.547.00 Europe labeled control map
5.548.00 North America labeled control map
5.549.00 South America labeled control map
5.550.00 United States labeled control map
5.550.10 Canada labeled control map
5.551.00 Africa unlabeled control map
5.552.00 Asia unlabeled control map
5.553.00 Australia unlabeled control map
5.554.00 Europe unlabeled control map
5.555.00 North America unlabeled control map
5.556.00 South America unlabeled control map
5.557.00 United States unlabeled control map
5.557.10 Canada unlabeled control map
5.558.00 continent labels
5.559.00 Africa labels
5.560.00 Asia labels
5.561.00 Australia labels
5.562.00 Europe labels
5.563.00 North America labels
5.564.00 South America labels
5.565.00 United States labels
5.565.10 Canada labels
5.566.00 Africa country cards
5.567.00 Asia country cards
5.568.00 Australia country cards
5.569.00 Europe country cards
5.570.00 North America country cards
5.571.00 South America country cards
5.572.00 United States cards
5.572.40 Europe Country/Capitals set
5.572.50 North America Country/Capitals set
5.572.70 US States/Capitals set

compass labels
earth labels

C. Geography Pictures

geography folders for each continent
artifacts from different continents and countries

D. Wooden Maps with Flags

0.179.01 four maps of Europe
0.238.00 four maps of North America
0.239.00 four maps of South America

E. Flags

0.232.00 flag stand of Asia
0.233.00 flag stand of Europe
0.233.A0 flag stand of North and South America
0.233.B0 flag stand of Africa
5.538.00 parts of the flag matching cards
5.539.00 flag paper
5.540.00 parts of the flag descriptions

3. Miscellaneous

A. Days and Months

5.541.00 naming days and months .
names of the months (large set for birthday celebrations)

B. D[illegible]ns

compass directions

C. Hemispheres

earth labels

D. Rainy day indoor recess activity

5.535.00 U.S.A. location color set

Geography for the Elementary: Activities and Materials Overview

1. Preliminary Exercises

(Many of these exercises overlap with the preschool geography, while others are more advanced.)

0.105.B0 command box in a natural finish:
for command cards (5.502.00, 5.504.00)
for parts of the flag (5.538.00, 5.540.00)
0.171.01 cabinet of the USA
0.173.01 cabinet of the world parts
0.174.A0 extra flags, yellow
0.174.A1 extra flags, red
0.174.A2 extra flags, green
0.174.A3 extra flags, blue
0.174.A4 extra flags, white
0.177.00 puzzle map of the world parts
0.236.00 puzzle map of USA
0.195.01 clear plastic envelopes (4) (for 5.500.00, 5.501.00)
0.195.B0 box for the first set of botany cards (use for land and water forms, cards)
0.230.00 globe of land and water
0.231.00 globe of the world parts
0.232.00 flag stand of Asia
0.233.00 flag stand of Europe
0.233.A0 flag stand of North and South America
0.233.B0 flag stand of Africa
1.626.00 cabinet for paper maps (4)
2.000.00 flag puzzle of the Americas
3.832.00 flag puzzle of Europe
5.500.00 land and water forms, cards
5.501.00 land and water forms, descriptions
5.502.00 land and water forms, command cards 1
5.503.00 land and water forms, labels
5.504.00 land and water forms, command cards 2
5.508.00 world maps 11" x 17"—outlines only
5.509.00 world maps 11" x 17"—political boundaries
5.510.00 world maps 11" x 17"—political with lakes
5.511.00 hemisphere maps and labels set
5.512.00 world unlabeled control map
5.512.10 world labeled control map
5.514.00 Africa outline
5.515.00 Africa waterways
5.516.00 Africa political
5.517.00 Asia outline
5.518.00 Asia waterways
5.519.00 Asia political
5.520.00 Australia outline
5.521.00 Australia waterways
5.522.00 Australia political
5.523.00 Europe outline
5.524.00 Europe waterways
5.525.00 Europe political
5.526.00 North America outline
5.527.00 North America waterways
5.528.00 North America political
5.529.00 South America outline
5.530.00 South America waterways
5.531.00 South America political
5.532.00 U.S.A. map outline
5.533.00 U.S.A. map waterways
5.534.00 U.S.A. map—state boundaries
5.535.00 U.S.A. location color set
5.538.00 parts of the flag matching cards
5.539.00 flag paper
5.540.00 parts of the flag descriptions
5.541.00 naming days and months
5.550.00 United States labeled control map
5.572.40 Europe country/capitals set
5.572.50 North America country/capitals set
5.572.70 US states/capitals set

2. The Beginning

Note: Materials for a particular exercise are not set up on their own individual tray in the elementary class. Rather, the children have to think through and get all the materials they need from the supply that is kept on a shelf. Chemicals are locked in a closet and are taken out only under the direction of the teacher. The teacher remains with the children through the time it takes to do experiments that require the use of chemicals.

In this list, as many harmful chemicals as possible have been replaced by harmless ones; still, some chemicals are dangerous and should be handled only by the teacher.

A. Great Lesson

baking soda
bowls, glass, with transparent sides
charts, impressionistic (handmade)
dishes, small metal
food coloring, red
glasses or beakers, identical
glass (for water)
hot plate or sterno stove
ice
iron, small piece
liquid, heavy (such as molasses or honey)
jar, clear glass, with cover
lead shot
matches, fireplace
oil
paper, torn into small pieces, in small container
paraffin
perfume with bad smell
solder
test tubes
tray
vinegar
volcano
water
wax
wood, piece that may be broken

B. Composition of the Earth

chart, impressionistic (handmade)
magnet, large
paper, black
weight, iron
yardstick

3. The Nature of the Elements

A. Properties of the Three States of Matter

basin
bowl, glass, with cold water
containers, clear, of various sizes and shapes
food coloring
glass, empty
hot plate or sterno stove
lead shot, in transparent glass container
lead solder
paper, thin sheet
perfume, bad smelling, in spray bottle
pitcher, glass
pitcher, plastic, with holes covered by removable tape
objects, solid (some heavy—wood, clay, tile, rock, brick, etc.)
teaspoon
trays

B. Further States of Matter

bricks or blocks of wood
Bunsen burner or Sterno™ stove
clay in rectangular shape
eraser in rectangular shape
honey
matches
oil
sheet of clear glass (edges taped) or Plexiglass™ (6.5" x 12")
spheres:
  clay
  rubber
  Styrofoam™
  wood
test tubes
test tube rack
tongs
trays
water
weights, set of
wood, balsa, same lengths but 3 different thicknesses
wood, rectangular piece

C. Different Ways of Combining

absorbent pad
*ammonia
beaker
chalk powder
corks
*cupric sulfate (powdered)
custard cup, Pyrex™
dishes, Pyrex™
glasses
handkerchief, white
*hydrochloric acid
iron filings
*lead nitrate
labels, prepared
marble chip
magnet, strong
matches
metal plate
pitcher containing water
rods, glass stirring
salt
sand, clean
saucer, ceramic
spoon
*sulfur (or flour)
sugar
*sulfuric acid
test tubes, Pyrex™
test tube rack
tongs
trays
tray with a heat-protected top

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*Dangerous chemicals which should be handled only by the teacher.

D. Attraction of the Earth and Gravity

- bowl, large glass
- bricks
- cork
- honey
- magnet, strong
- marbles
- objects, various:
  - some magnetic (some heavy)
  - some non-magnetic
- oil
- paper clips
- ping pong balls
- sand, clean
- test tubes, Pyrex™
- trays
- water
- wood, thin board

E. Composition of the Earth

- chart, impressionistic (handmade)
- honey or molasses
- iron weight
- oil
- magnet, large
- paper, black
- test tubes, Pyrex™
- water
- yardstick

4. Sun and Earth

A. Rotation of the Earth and Its Effects

- 0.230.00 globe of land and water
- charts, impressionistic (handmade)
- clock symbols
- lamp with bulb, no shade
- paper, narrow strip
- twelve black strips
- twelve white strips
- weight, tied to a string

B. Perpendicular and Oblique Rays

- chalk, white
- charts, impressionistic (handmade)
- clay:
  - flat rectangle
  - sphere
- flashlight
- magnifying glass
- paper:
  - black
  - white
- toothpicks

C. Solstices and Seasons

- 0.230.00 globe of land and water
- charts, impressionistic (handmade)
- clay:
  - sphere
  - small piece
- globe, large
- knitting needle
- labels, handmade
- lamp with bulb, no shade
- paper, strips:
  - blue
  - brown
  - green
  - pink
  - red
  - white
- pin, straight, with colored head
- suns, handmade

D. Protection of the Atmosphere and the Rains

- bowl, large glass
- Bunsen burner, hot plate, or Sterno™ stove
- charts, impressionistic (handmade)
- hair dryer
- pad, heatproof
- pitcher, small
- saucepan, small
- saucer
- spoon, metal
- tray
- water

5. The Work of Air

A. Winds

- candle, small
- charts, impressionistic (handmade)
- clay
- flask, glass, with rubber or cork stopper with hole
- funnel, glass
- incense, stick
- matches
- paper circles
- paper spirals
- pencils
- pin, stick
- pitcher, small
- pole in metal base
- tray
- tube, cardboard, with rectangular piece cut from one end
- water

B. Effect of Heat on Land

- bowls, Pyrex™
- charts, impressionistic (handmade)
- clock, watch, or oven timer
- hot pads
- mat, heat proof
- metal covering plate for stove
- refrigerator
- sand
- Sterno™ stove
- thermometers
- tongs
- tray
- water

C. Seasonal Changes

arrows, red and blue (handmade)
charts, impressionistic (handmade)
sun (handmade)

D. Oceanic Current

basin, large
bowl, transparent glass
brick or rock
charts, impressionistic (handmade)
flask, Pyrex™
ice cubes
metal covering plate for stove
pad, heatproof
pitcher, small
sawdust
Sterno™ stove
tubing
water, warm
water, cold, colored
specimens, wind-eroded rocks

E. Wind as Sculptor

chart, impressionistic (handmade)
pictures of rock formations

6. Work of Water

A. The River

aluminum foil
bowl or pan, clear glass
chalk powder
charts, impressionistic (handmade)
clay
hose or plastic tubing with funnel on one end
map, North America, with transparent overlays (handmade)
newspaper
pebbles
river model (handmade)
rocks, small
sand, regular, several different colors and sizes
water

B. Rain

boards on which to build models
chart, impressionistic (handmade)
clay
moss
rock
sand
water
watering can

C. Waves

basin or tub, large
clay
sand
plywood
water
wood, small board

D. Ice

bottle, thin glass
charts, impressionistic (handmade)
freezer
tray
water

E. Water Cycle

charts, impressionistic (handmade)

F. Spread of Vegetation

chart, impressionistic (handmade)
plants, different kinds, live specimens and pictures

G. People in Different Zones

0.195.01 clear plastic envelopes
0.195.B0 box for the first set of botany cards (use for geography cards)
charts, impressionistic (handmade)
nomenclature material, peoples of the arctic, tropics, desert

H. Composition of the Earth

0.188.01 square based prism—elementary geometric solids
0.188.B0 five yellow prisms
bag, plastic zipper
blocks of wood cut to show the movements of faults
bowl, glass
charts, impressionistic (handmade)
coffee grounds
felt of different colors
flask with cork with hole
funnel, glass
hot plate
pictures of mountains of different types
rock, heavy
teapot
water
wood, small flat piece

7. Economic Geography

A. Production and Consumption

5.508.00 world map 11" x 17"
5.514.00 Africa outline
5.517.00 Asia outline
5.520.00 Australia outline
5.523.00 Europe outline
5.526.00 North America outline
5.529.00 South America outline
5.532.00 U.S.A. map outline
state in which school is located
books, source (almanacs, encyclopedias, atlases, agricultural charts, natural resource charts, etc.)
glue
paper:
  plain
  lined
  quadrille
pencils:
  regular
  colored

products, natural resources, and raw materials stamps
scissors
stamp pad, inked

B. Imports and Exports

The following maps are used to make examples:
5.508.00 world 11" x 17"—outlines only
charts, impressionistic (handmade)

C. Interdependencies

0.105.B0 command box in a natural finish (3)
card material, 6 sets (handmade)
paper, large sheets, white
pencils, colored
pot, small

8. Nomenclature

A. Mountains

0.195.01 clear plastic envelopes
0.195.B0 box for the first set of botany cards (use for mountain cards)
5.508.00 world map 11" x 17"
5.514.00 Africa outline
5.517.00 Asia outline
5.520.00 Australia outline
5.523.00 Europe outline
5.526.00 North America outline
5.529.00 South America outline
5.532.00 U.S.A. map outline
clay
glue
labels (handmade)
nomenclature materials (handmade)
paper, heavy, for making models of mountains
paper, strips
pencils, colored
plywood
scissors
toothpicks
water
watering can

B. Rivers

0.195.01 clear plastic envelopes
0.195.B0 box for the first set of botany cards (use for river cards)
nomenclature materials (handmade)
other materials from "Work of Water" (see above)

C. Coastlines

0.195.01 clear plastic envelopes
0.195.B0 box for the first set of botany cards (use for coastline cards)
nomenclature materials (handmade)

D. Inland Land Formations

0.195.01 clear plastic envelopes
0.195.B0 box for the first set of botany cards (use for land formations cards)
nomenclature materials (handmade)

9. Experiments

cards, experiments (handmade)
file boxes for 5" x 8" experiment cards

Biology for the Preschool: Activities and Materials Overview

1. Botany

A. Familiarization–caring for live plants in the environment

5.662.00 writing paper blue lined 4.25" x 5.5"
5.665.00 writing paper blue lined 8.5" x 11"
5.669.00 writing paper green lined 8.5" x 11"
Note: all of the above paper may be used for drawing successive stages of plant growth
fertilizer
garden soil
light source
mister
peat
pebbles
plants, live
pottery
saucers or pans on which to set plant pots
stand(s) for plants
vermiculite
water
watering can

B. Needs of Plants

cotton, sterile
garden soil
labels (handmade)
trays
saucers with cotton
seeds
water
watering can

C. Plant Stories

folders with pockets (different folder for each plant)
labels (handmade)
pictures (find and mount)
text for pictures (handmade)
Who am I? sets (handmade)

D. The Leaf

0.041.00 botany cabinet
0.043.00 leaf cards
0.044.00 leaf cards cabinet
5.627.00 botany cabinet matching cards
5.628.00 botany cabinet control chart
5.629.00 parts of a leaf
botany cabinet labels
leaf specimens
magnifying glass
plants, live
tray
water

E. The Flower

5.630.00 parts of a flower

F. Nomenclature materials

0.195.00 first set botany cards
0.195.A1 name cards for first set of botany cards
0.195.B0 box for the first set of botany cards
0.196.00 second set botany cards
0.196.A1 name cards for second set of botany cards
0.196.B0 box for the second set of botany cards
0.197.00 third set botany cards
0.197.A1 name cards for third set of botany cards
0.197.B0 box for the third set of botany cards
definitions/descriptions (handmade)

G. Botany books for additional information

2. Zoology

A. Familiarization–caring for live animals in the environment

5.618.00 parts of the human body
5.619.00 parts of the human body paper
6.620.00 animals and their homes
6.621.00 animals and their sounds
6.622.00 animals and their young
6.623.00 animal names
6.624.00 animals and their groups
aquariums and all necessary equipment, as appropriate
bedding, as appropriate
cages, as appropriate
food, as appropriate
newspaper
specimens

B. Animal Stories

folders with pockets (different folder for each animal)
labels (handmade)
pictures (find and mount)
text for pictures (handmade)
Who am I? sets (handmade)

C. Nomenclature

0.195.B0 box for the first set of botany cards (use for external parts of vertebrates)
external parts of vertebrates (handmade)
heading cards (handmade)

D. Zoology books for additional information

3. Classification Exercises

A. Living–Non-Living

real objects
pictures

B. Plant–Animal

real plants and animals
pictures

C. Etc., as far as interest allows

Biology for the Elementary: Activities and Materials Overview

1. Botany

A. Familiarization–caring for live plants in the environment

cards, care of plants in class (handmade)
fertilizer
garden soil
light source
mister
peat
pebbles
plants, live
pottery
saucers or pans on which to set plant pots
stand(s) for plants
vermiculite
watering can

B. Needs of Plants

box, with lid and 2 windows (handmade)
*calcium nitrate
chart, impressionistic (handmade)
cotton, sterile
*ferric chloride
garden soil
jars and lids
labels (handmade)
*magnesium sulfate
metal tray
nomenclature materials—see J below (handmade)
paper strips and scissors
*potassium phosphate
saucers with cotton
seedlings germinated in damp sawdust
seeds
water, distilled
watering can

C. The Leaf and Its Functions

0.041.00 botany cabinet (overlaps with preschool)
5.627.00 botany cabinet matching cards (overlaps with preschool)
5.628.00 botany cabinet control chart (overlaps with preschool)
5.629.00 parts of a leaf (overlaps with preschool)
bag, clear plastic zipper
botany cabinet labels (overlaps with preschool)
charts, impressionistic (handmade)
funnel, transparent glass
jar, broad mouthed

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*Dangerous chemicals which should be handled only by the teacher.

leaf specimens
microscope
nomenclature materials—see J below (handmade)
plant, aquatic
plants, live
test tube holders
test tubes, glass
tray
water

D. The Root and Its Functions

basket, wire
blotter paper
bowl
charts, impressionistic (handmade)
corkboard
flower pot, tapered
garden soil
jars, glass:
  small
  tall
magnifying glass
moss, sphagnum
nomenclature materials—see J below (handmade)
pan, glass
paper, black
pencil
pictures, different types of roots
pins, push
root specimens
rubber bands
sand
seedling
seeds: corn, bean, etc.
stone
string
test tube holders
test tubes, glass
toothpick
water

E. The Stem and Its Functions

celery
charts, impressionistic (handmade)
food coloring
jar
nomenclature materials—see J below (handmade)
seeds
specimens: bark, stems, cross section of tree trunk
tissue
water

F. The Flower

5.630.00 Parts of a flower (overlaps with preschool)
chart, impressionistic (handmade)
nomenclature materials—see J below (handmade)
paper:
  black
  long strips and scissors
  plain white
pencil
razor blade, single edged or scalpel
specimens: butterfly, bee, flowers
tweezers

G. Fruit

nomenclature materials—see J below (handmade)
nutcracker
paper:
  black
  long strips and scissors
  plain white
paring knife
pencil
razor blade, single edged or scalpel
specimens: variety of fruits
tweezers

H. Seeds

charts, impressionistic (handmade)
nomenclature materials—see J below (handmade)
paper:
  black
  long strips and scissors
  plain white
pencil
razor blade, single edged, or scalpel
specimens: variety of seeds
tweezers

I. Botany Experiments

experiment cards (handmade)
file boxes, large (3)

J. Nomenclature materials

0.195.00	first set botany cards
0.195.A1	name cards for first set of botany cards
0.195.B0	box for the first set of botany cards
0.196.00	second set botany cards
0.196.A1	name cards for second set of botany cards
0.196.B0	box for the second set of botany cards
0.197.00	third set botany cards
0.197.A1	name cards for third set of botany cards
0.197.B0	box for the third set of botany cards

definitions, descriptions (handmade)

K. Classification Chart 1

chart (handmade)
labels (handmade)

L. Classification Material–Kingdom Vegetalia

branches (handmade)
chart (handmade)
envelopes, nesting
labels (handmade)
pictures (handmade or found and mounted)
specimens: lichen, ferns, mushrooms, moss, algae, etc.
text (handmade)

M. Botany books for additional research

2. Zoology

A. Familiarization (overlaps with preschool)—caring for live animals in the environment

5.618.00 parts of the human body
5.619.00 parts of the human body paper
6.620.00 animals and their homes
6.621.00 animals and their sounds
6.622.00 animals and their young
6.623.00 animal names
6.624.00 animals and their groups
aquariums and all necessary equipment, as appropriate
bedding, as appropriate
cages, as appropriate
food, as appropriate
newspaper
specimens (see specimen list)

B. Animal Stories

cardboard tubes
folders (for 8.5" x 11" sheets) with pockets (different folder for each animal)
labels (handmade)
pictures (find and mount)
text for pictures (handmade)
question cards (handmade)
Who am I? sets (handmade)

C. Nomenclature

0.195.B0 box for the first set of botany cards, 10 (use for external parts and body functions)
0.195.01 clear plastic envelopes (use for the card material above)
external parts of vertebrates (overlaps with preschool) (handmade)
body functions (handmade)
heading cards (handmade)

D. Classification

charts, impressionistic (handmade)
labels (handmade)

E. Classification Material–Kingdom Animalia

branches (handmade)
chart (handmade)
envelopes, nesting
labels (handmade)
pictures (handmade)
text (handmade)

F. Zoology books for additional research

3. Ecology

charts, impressionistic (handmade)

The Arts (Visual Arts, Music, Drama, Movement)

The arts are integrated into the daily life of the classroom. Fundamental techniques and concepts (pitch, rhythm, use of specific media, movement patterns) are presented in isolation to assist the child in developing a personal repertoire of skills. The children then use these skills to give expression to their own ideas and feelings and to join with others in communal celebration and expression. Children are also introduced to a wide variety of styles of artistic expression, developing an appreciation for the contributions of artists both known and unknown.

Art in the Preschool: Activities and Materials Overview

In the preschool, art materials are kept on their own section of shelving, usually near an easel. The art materials are available as a choice just as are the rest of the materials in the classroom environment.

Art in the Elementary: Activities and Materials Overview

In the elementary, the art studio should be immediately adjacent to or occupy a secluded section of the classroom environment. In it should be available the following techniques and media:

Carving media
Clays and other modeling media
Collage/mosaic materials
Crayons, chalk, colored pencils, and other drawing media
Inks and dyes
Painting techniques
Paper
Printing techniques
Structuring
Textiles

Music in the Preschool: Activities and Materials Overview

0.063.A0	bells set
0.063.B0	bells keyboards (2)
0.063.C0	bells staff board (1)
0.063.D0	bells staff boards (2)
0.063.E1	bells music signs and notes
0.063.F0	bell mallet (3)
0.063.G0	bell damper (3)
0.064.00	bell music strip boards
1.715.01	side panels for bell/tone bar cabinet
1.715.02	top & legs for bell/tone bar cabinet
5.350.00	*Montessori Music: A Guide to Using the Bells*
5.342.00	*Children's Songs*, by Sanford Jones
5.344.00	*Folk Songs*, by Sanford Jones

Music in the Elementary: Activities and Materials Overview

0.063.A0	bells set
0.063.B0	bells keyboards (2)
0.063.C0	bells staff board (1)
0.063.D0	bells staff boards (2)
0.063.E1	bells music signs and notes
0.063.F0	bell mallet (3)
0.063.G0	bell damper (3)
0.064.00	bell music strip boards
5.350.00	*Montessori Music: A Guide to Using the Bells*
5.342.00	*Children's Songs*, by Sanford Jones
5.344.00	*Folk Songs*, by Sanford Jones
0.100.A0	tone bars set with two mallets
0.100.A1	tone bar keyboards
0.100.A2	tone bar mallet (5)
1.715.01	side panels for bell/tone bar cabinet (2) (use one for the bells)
1.715.02	top & legs for bell/tone bar cabinet (2) (use one for the bells)

Additional information on Montessori music is available in the doctoral dissertation *The Montessori Music Curriculum for Children up to Six Years of Age*, by Jean Karen Miller. Many of the activities it describes are appropriate for the elementary-age child as well. It may be obtained from University Microfilms International, 300 North Zeeb Road, Ann Arbor, Michigan 48106 (telephone 800-521-0600) or 18 Bedford Row, London, WC1R 4EJ, England. Order number 8109598.

The Prepared Environment at the Infant/Toddler Level

Courtesy of Judi Orion

The Nido

The Nido (Italian for "nest") environment provides quality care for a maximum of nine infants, ages two months to fourteen months. The carefully prepared Montessori environment presents a homelike setting in which the children are assisted in their developmental process by stimulation of the five senses, encouragement of gross and fine motor control, and introduction of self-help skills at an individual pace.

The Nido area consists of a large classroom with a wood or tile floor. The large space includes a built-in multi-level area for movement, a carpeted area with mats or futons where the children may sleep, a changing area with a large sink, a nursing area, a restroom, and a combination kitchen/dining area. Materials found in the Nido classroom are mirrors, a couch and rocking chair, weaning table and chair, kiosks, a foam mat and futon mattress, and one or two shelf units. Outdoors, just outside the classroom, is a small garden with a play area and play equipment (a swing, pipes and tubes, and a walking bar). The Nido is lovingly nurtured by a trained and certified Montessori teacher and two to three assistants.

Activities and Materials Overview[1]

- Area for Sleeping:
  - Futons or mats
- Area for Feeding:
  - Adult Chair
  - Weaning Table
  - Communal Dining Table
  - Weaning Chair
  - Slatted Chair
- Area for Physical Care:
  - Storage for Children's Clothes
  - Changing Table
  - Diaper Pail
  - Dirty Clothing Container
  - Trash Container
- Area for Movement:
  - Mat with Mirror
  - Kiosks with Bar
  - Bars on Wall
  - Stair
  - Heavy Table
  - Ball and Ramp
  - Tracker
- Objects Used for Transporting Children:
  - Wagons
  - Strollers
  - Prams
- Aids to Visual Stimulation:
  - Octahedron Mobile
  - Gobbi Mobile
  - Mobile of Stylized Paper Figures
- Aids to Visual, Tactile, and Auditory Stimulation:
  - Mobile of Stylized Wooden Figures
  - Mobile of Three Colored Spheres
  - Bell on a Ribbon
  - Ring on a Ribbon
  - Interlocking Circles
  - Grasping Beads
  - Rubber Ball with Protrusions
  - Sphere with Little Balls, Dolio and Variation
  - Interlocking Wooden Rings
  - Home Objects: Belt Buckle, etc.
  - Bamboo Cylinder Rattle
  - Cylinder Rattle with Bells
  - Clacker and Other Commercial Rattles
  - Dried Gourds
  - Cube with a Bell
  - Bells on a Leather Strap
  - Silver Rattle
  - Music Box
- Aids to the Development of Eye-Hand Coordination:
  - Punch Ball
  - Basket with Known Objects
  - Cup with Ball, Box, and Cube
  - Box with Ball and Tray
  - Box with Ball and Drawer
  - Box with Balls and Push
  - Box with Knitted Balls.
- Aids for Crawling, Pulling Up, Standing, and Walking:
  - Knitted Ball
  - Cylinder with Bell Variations
  - Ottoman
  - The Bar
  - Balls of Various Sizes and Textures
  - The Wagon
  - A Top
- Aids to the Development of Equilibrium and Eye-Hand Coordination:
  - Furniture with Keys
  - Cabinet Doors
- Aids to Eye-Hand and Eye-Hands Coordination:
  - Rings and Pegs on Rocking Base
  - Ring on Stable Base
  - Basket with Rings and Peg
  - Spindle with Napkin Rings
  - Round Base and Rings of Different Dimensions
  - Lock and Keys in Basket
  - Other Household Objects

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[1] A Montessorian trained at the infant level is necessary to set up and operate a Nido or Infant Community. These materials lists are not intended as a substitute for Montessori Assistants to Infancy training.

The Infant Community

Children leave the Nido and enter the Infant Community (sometimes called Toddler Community or Young Children's Community) at approximately twelve to fifteen months of age, or when they are securely walking. As in the Nido, the Montessori environment is carefully prepared to aid the toddler in achieving independence. Social interaction with other children, development of language skills, cooking, music, and movement activities are stressed.

The Infant Community consists of a large living room area, a movement area, bathrooms, a kitchen for cooking, a dining area, storage areas, office work room, and a lounge and conference room. Outside the classroom is a small garden area where the children plant and tend seeds and where they may play. Materials include a climbing structure, sandbox, some wheeled toys, a balance beam, and a little playhouse. The Infant Community has one Montessori teacher and one assistant in a class of twelve children.

Activities and Materials Overview

- Furniture:
  - Cubbies or Lockers
  - Changing Table
  - Slatted Chairs
  - Tables: Square, Circular, Rectangular
  - Stools
  - Bench
  - Shelves
  - Beds
- Aids for Crawling, Pulling Up, and Walking:
  - Various Carts
  - The Outdoor Stair
  - Slide
  - Small Climbing Dome
  - Cube with Curtain
- Aids for Development of Eye-Hand Coordination:
  - Infilare:
    - Peg Box
    - Cubes on Vertical Dowel
    - Discs on Horizontal Dowel
    - Three Pegs with Small Rings
    - Bead Stringing
  - Imbucare:
    - Mail Box
    - Slotted Box with Chips
  - Sorting
  - Basket of Containers
  - Puzzles
- Aids to Coordination of Movement for Opening and Closing:
  - Wooden Box with Sliding Lid
  - Box with Bins
  - Latches
- Materials for Refinement of Hand Movements:
  - Sewing
  - Gluing
  - Use of Scissors
  - Folding
  - Spooning
- Materials for the Refinement of the Stereognostic Sense:
  - Classified Fishing Bag
  - General Fishing Bag
- Language:
  - Nomenclature Objects
  - Objects with Matching Cards
  - Nomenclature Cards
  - Books
- Music and Movement:
  - Singing
  - Musical Instruments
  - Movement Games
- Art:
  - Paper Tearing
  - Scribbling
  - Easel, Chalk
  - Easel, Painting
  - Clay
  - Watercolor Painting
- Exercises of Practical Life:
  - Care of the Person:
    - Undressing, Dressing, and Sorting Clothes
    - Handwashing as an Exercise
    - Handwashing in the Bathroom
    - Brushing Hair
    - Wiping the Nose
    - Cleaning Shoes
    - Polishing Shoes
    - Brushing Teeth
    - Dressing Frames:
      - Velcro®
      - Zipper
      - Large Button
      - Snaps

Care of the Environment:
- Wiping a Table
- Washing a Table with Soap
- Dusting
- Sweeping
- Mopping
- Cleaning Glass
- Polishing a Mirror
- Polishing Wood
- Dusting Plants
- Washing Plants
- Watering Plants
- Flower Arranging
- Washing Clothes
- Hanging Up Clothes
- Ironing Clothes
- Germinating Seeds
- Exercises Relating to Nature

Exercises of Grace and Courtesy:
- Movement:
  - Carrying a Chair
  - Sitting on a Chair
  - Carrying a Table
  - Carrying a Bench
  - Use of a Rug
- Food:
  - Setting the Table
  - Serving Food
  - Cleaning Up
  - Washing Dishes
  - Drying Dishes
  - Bread Making
  - Water Preparation: Plain, Lemon
  - Cutting Fruits and Vegetables

Class Inventories & Order Summaries

Following are lists of materials for the preschool and elementary levels in two different formats. First are classroom inventories arranged by curriculum area, including Montessori apparatus (with Nienhuis order numbers), curriculum support materials (with Nienhuis order numbers), other purchased materials, and handmade materials. Because they are arranged by curriculum area, they contain some duplication (e.g., the bells are used in the preschool as both sensorial and music materials and therefore appear on the lists for both of these curriculum areas, but a classroom does not need to contain two sets of bells).

Summary inventories of Montessori apparatus and curriculum support materials, without duplication, appear after the inventories by curriculum area, for ease of ordering.

Preschool Class Inventory by Curriculum Area

Montessori Apparatus

Practical Life

0.001.00	buttoning frame with small buttons
0.002.00	buttoning frame with large buttons
0.003.00	bow tying frame
0.004.00	lacing frame
0.005.00	hook and eye frame
0.006.00	safety pin frame
0.007.00	snapping frame
0.008.00	zipping frame
0.009.00	buckling frame
0.010.00	shoe buttoning frame
0.011.00	shoe lacing frame
0.012.00	Velcro™ closure frame
1.632.00	dressing frames stand
1.640.00	rose carpet (2)
1.641.00	green carpet (2)
1.642.00	blue carpet (2)
1.643.00	gray carpet (2)
1.644.00	beige carpet (2)
1.727.00	the complete practical life stand
1.731.00	stand for 3 carpets (3)
OR	
1.732.00	stand for 5 carpets (2)

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4.014.00	shoe polishing brush set, 4 brushes (also included in 1.727.00)
4.015.00	small dust brush
4.033.00	8-piece brassware set
4.042.00	dust brush
5.677.00	scissors exercise (2)
7.701.00	scissors with rounded point 10 cm (12)
7.708.00	six-scissor storage block (2)

Sensorial

0.012.40	smooth gradation board
0.012.A0	rough and smooth boards set
0.014.00	rough gradation tablets
0.014.40	smooth gradation tablets
0.014.50	fabric box
0.015.00	smelling bottles
0.015.50	tasting exercise
0.016.00	sound boxes
0.017.00	baric tablets
0.017.30	mystery bags, empty, set of 2
0.017.40	mystery bags, geometric shapes
0.017.70	mystery bags, familiar items
0.017.A0	blindfold (6)
0.018.00	thermic bottles
0.018.A0	thermic tablets
0.019.00	cylinder block #1
0.020.00	cylinder block #2
0.021.00	cylinder block #3
0.022.00	cylinder block #4
0.023.00	set of knobless cylinders
0.024.00	pink tower
0.024.10	stand for pink tower
0.024.20	box with cubes for the pink tower
0.025.00	brown stair
0.025.20	box with prisms for the brown stair
0.026.00	long rods, red
0.037.00	geometric cabinet
0.038.00	demonstration tray
0.039.00	geometric form cards
0.039.A0	geometric form cards for the demonstration tray
0.040.00	geometric form card cabinet
OR	
0.040.A0	geometric form card box
0.040.A0	leaf cards box
0.041.00	botany cabinet
0.043.00	leaf cards
0.044.00	leaf cards cabinet
0.045.00	circles, squares, triangles for superimposed figures
0.045.50	inscribed and concentric figures, plastic
0.045.70	inscribed and concentric figures, paper
0.048.00	geometric solids
0.048.A0	geometric plane figures with box
0.048.B0	geometric solids basket (2)
0.048.C0	geometric cards
0.049.00	constructive triangles
0.051.00	first box of color tablets
0.052.00	second box of color tablets
0.053.00	third box of color tablets
0.063.A0	bells set
0.063.B0	bells keyboards
0.063.C0	bells numbered staff board
0.063.D0	bells staff boards (2)
0.063.E1	bells music symbols
0.063.F0	bell mallet (3)
0.063.G0	bell damper (2)
0.064.00	bells music strip boards
0.131.00	binomial cube
0.132.00	trinomial cube
0.186.00	table of Pythagoras
0.198.00	botany puzzles
0.199.A0	animal puzzle, horse
0.199.B0	animal puzzle, frog
0.199.C0	animal puzzle, fish
0.199.D0	animal puzzle, turtle
0.199.E0	animal puzzle, bird
0.320.00	first aid kit for sensorial material
1.715.01 & 1.715.02	bell cabinet (order both)
9.500.00	pink touch-up paint
9.500.10	pink touch-up paint (new pink)
9.501.00	red touch-up paint
9.502.00	yellow touch-up paint
9.503.00	green touch-up paint
9.504.00	dark blue touch-up paint
9.505.00	clear touch-up varnish
9.506.00	thinner for repair paint
9.507.00	brown touch-up paint
9.508.00	black touch-up paint
9.509.00	light blue touch-up paint

Language

0.045.A0	detective adjective exercise
0.046.00	metal insets
0.047.00	metal insets stands
0.054.A0	box for the sandpaper letters
0.054.B4	sandpaper letters, cursive
0.056.A0	box for the double sandpaper letters
0.056.B4	double sandpaper letters, cursive
0.057.A0	box for the sandpaper capitals
0.057.B4	sandpaper capitals, cursive
0.058.00	wooden boards
0.059.A3	large movable alphabet, print (without box)
0.059.A4	large movable alphabet, cursive (without box) (3 sets)
0.059.C1	box for the large movable alphabet, cursive (3 boxes)
0.059.C3	box for the large movable alphabet, print
0.060.A3	small movable alphabet, red, print
0.060.A5	small movable alphabet, blue, print
0.060.A7	small movable alphabet, black, print
0.060.C2	box for the small movable alphabet (3)
0.066.00	blank greenboard—2 (order 2 sets)
0.067.00	greenboard, with lines and squares—2

0.068.00	greenboard, double lined/squares—2
0.108.01	reading/sentence analysis set
0.108.A1	reading analysis, first chart and box
0.110.A0	noun symbol, plastic
0.110.B0	article symbol, plastic
0.110.C0	adjective symbol, plastic
0.110.E0	verb symbol, plastic
0.110.F0	preposition symbol, plastic
0.110.G0	adverb symbol, plastic
0.110.I0	conjunction symbol, plastic
0.111.A0	noun symbol, paper (5)
0.111.B0	article symbol, paper (5)
0.111.C0	adjective symbol, paper (5)
0.111.E0	verb symbol, paper (5)
0.111.F0	preposition symbol, paper (3)
0.111.G0	adverb symbol, paper (3)
0.111.I0	conjunction symbol, paper (5)
0.112.A0	grammar symbols box, 10 compartments (2)
0.115.00	metal squares—9 plates (may be displayed on a classroom shelf or on 0.114.A0—order one set for this)
0.116.00	metal triangles—4 plates (may be displayed on a classroom shelf or on 0.114.A0—order one set for this)
0.249.00	the farm
1.640.00-1.644.00	carpets in 5 colors (2 of each color)
1.725.00	farm table
1.730.00	wall frame for metal insets
1.735.00	stand for greenboards
1.732.00	stand for 5 carpets (2)
OR	
1.731.00	stand for 3 carpets (3)
7.023.00	paper box for 14 x 14 cm paper (5.5" x 5.5") (2)
7.201.00	11 dozen inset pencils (11 colors) (3)
7.202.00	dozen red inset pencils (5)
7.203.00	dozen dark blue inset pencils (5)
7.204.00	dozen dark green inset pencils (5)
7.211.00	dozen black inset pencils (5)
7.304.00	holder for 3 pencils (5)
7.305.00	set of 11 colored pencil holders
7.701.00	scissors with rounded point 10 cm (12)
7.708.00	six-scissor storage block (2)
9.157.00	rubber desktop pad 5.5" x 5.5" (14 x 14 cm) (5) (backing for metal inset paper)

Mathematics

0.027.00	number rods
0.028.13	sandpaper numerals, USA style, print
0.028.A0	sandpaper numerals box
0.030.03	teen boards, USA style, print
0.030.AG	teen bead box, individual beads, glass (2)
0.031.03	tens boards, USA style, print
0.031.AG	tens bead box, individual beads, glass
0.032.03	spindle boxes, USA style, print
0.032.10	spindles, individual, per 10
0.032.B0	loose spindles box
0.033.03	printed numerals, USA style, print (3)
0.033.A0	printed numerals box (2)
0.034.01	red counters, (100)
0.050.01	dot exercise, framed board
AND/OR	
0.050.50	dot exercise, laminated board
AND/OR	
0.050.A0	dot exercise sheets
0.050.54	water-based pens, black, per 10
0.069.A0	box for large number cards (4)
0.069.C0	large number cards 1-1000, plastic
0.070.A0	box for small number cards (4 or 8)
0.070.C0	small number cards 1-3000, plastic (3 or 6)
0.071.C0	small number cards 1-9000, plastic (1 or 2)
0.072.C0	large number cards 1-9000, plastic (1 or 2)
0.074.10	wooden square, per 10 pieces (5 or 10)
0.075.10	wooden cube, per 10 pieces (2 or 4)
0.076.G0	45 golden ten bars in box, individual beads, glass (3)
0.077.G0	100 golden unit beads, individual beads, glass (with holes) (3)
0.081.00	wooden tray with two unit cups (10)
0.082.00	stamp game
0.086.B0	set of printed arrows for the bead material with boxes
0.086.G0	bead material, individual beads, glass
0.087.00	multiplication board set
0.092.00	addition strip board
0.092.A0	subtraction strip board
0.093.00	small bead frame (3)
0.094.00	large bead frame (2)
0.095.00	long division
0.095.A0	division tubes plastic (10)
0.095.B0	100 green beads with plastic box (2)
0.095.B1	100 blue beads with plastic box
0.095.B2	100 red beads with plastic box
0.096.A0	unit division board
0.097.00	small skittles per 100
0.114.00	fraction circles
0.114.A0	fraction circles stands (1 set for the fraction circles, one set for 0.115.00, and one set for 0.116.00)
0.115.00	metal squares—9 plates
0.116.00	metal triangles—4 plates
0.132.A0	geometric hierarchy of number
0.132.B0	geometric hierarchy number cards
0.142.A0	addition working charts
0.142.B0	subtraction working charts
0.142.C4	multiplication working charts
0.142.D1	division working charts
0.143.01	subtraction tables
0.144.01	addition tables
0.146.00	addition equations and sums box
0.147.00	subtraction equations and differences box
0.148.00	box of multiplication equations and products
0.149.01	division equations and dividends box
0.153.01	notation paper for the small bead frame (50 sheets) (4)
0.154.01	notation paper for the large bead frame (50 sheets) (2)

0.155.01	multiplication tables
0.158.01	division tables
0.186.00	table of Pythagoras
0.250.G0	introduction to decimal quantity, individual beads, glass
0.251.00	introduction to decimal symbols
0.252.G0	introduction to the decimal system, individual beads, glass
0.260.00	box with arithmetic signs
0.280.G0	multiplication bead bar layout box, individual beads, glass
0.290.G0	addition snake game, individual beads, glass
0.291.G0	subtraction snake game, individual beads, glass
0.320.01	first aid kit for math material
0.500.00	bead cabinet castors
1.760.00	bead material cabinet
3.100.00	clock with movable hands
3.101.01	clock exercises
9.124.00	10 weights in wooden storage box
9.129.00	small wooden scale

Geography

0.176.A0	puzzle maps stand (or 1.740.00 puzzle maps cabinet)
0.176.B0	puzzle map of Europe
0.176.C0	puzzle map of North America
0.176.E0	puzzle map of South America
0.176.F0	puzzle map of Africa
0.176.G0	puzzle map of Asia
0.176.H0	puzzle map of Australia
0.177.00	puzzle map of the world parts
0.179.01	four maps of Europe
0.230.00	globe of land and water
0.231.00	globe of the world parts
0.232.00	flag stand of Asia
0.233.00	flag stand of Europe
0.233.A0	flag stand of North and South America
0.233.B0	flag stand of Africa
0.235.01	cards of the world parts
0.236.00	puzzle map of USA
0.236.B0	puzzle map of Mexico
0.237.00	puzzle map of Canada
0.238.00	four maps of North America
0.239.00	four maps of South America
1.626.00	cabinet for paper maps
1.740.00	puzzle maps cabinet (or 0.176.A0 puzzle maps stand)

Biology

0.041.00	botany cabinet
0.043.00	leaf cards
0.044.00	leaf cards cabinet
0.195.00	first set botany cards (2)
0.195.A1	name cards for first set of botany cards (2)
0.195.B0	box for the first set of botany cards (4)
0.196.00	second set botany cards (2)
0.196.A1	name cards for second set of botany cards (2)
0.196.B0	box for the second set of botany cards (2)
0.197.00	third set botany cards (2)
0.197.A1	name cards for third set of botany cards (2)
0.197.B0	box for the third set of botany cards (2)

Music

0.063.A0	bells set
0.063.B0	bells keyboards (2)
0.063.C0	bells staff board (1)
0.063.D0	bells staff boards (2)
0.063.E1	bells music signs and notes
0.063.F0	bell mallet (3)
0.063.G0	bell damper (3)
0.064.00	bell music strip boards
1.715.00	bell cabinet
5.350.00	*Montessori Music: A Guide to Using the Bells*
5.342.00	*Children's Songs*, by Sanford Jones
5.344.00	*Folk Songs*, by Sanford Jones

Curriculum Support Materials

Sensorial

5.608.00	geometric cabinet matching cards
5.609.00	geometric cabinet control chart
5.610.00	geometric cabinet labels
5.613.00	commands for geometric cabinet
5.615.00	commands for geometric solids

Language

5.632.00	alphabet cards
5.633.00	phonetic flash cards
5.634.00	phonetic pictures and labels (3)
5.635.00	phonetic reading cards
5.637.00	phonogram booklets
5.638.00	phonogram cards
5.639.00	key spelling sorting cards
5.648.00	puzzle words

5.649.10	first books
5.650.00	easy reading booklets
5.651.00	illustrated poems
5.653.00	simple commands set 1
5.654.00	simple commands set 2
5.655.00	grammar games set 1
5.656.00	conjunctions and prepositions
5.657.00	noun labels for the farm
5.658.00	adjective phrases for the farm
5.659.00	positive, comparative, superlative
5.660.00	writing paper blue lined 2" x 8.5" (2)
5.661.00	writing paper blue lined 4" x 8.5" (2)
5.662.00	writing paper blue lined 4.25" x 5.5" (2)
5.663.00	writing paper blue lined 2.75" x 7" (2)
5.664.00	writing paper blue lined 7" x 8.5" (2)
5.665.00	writing paper blue lined 8.5" x 11" (2)
5.668.00	writing paper green lined 7" x 8.5" (2)
5.669.00	writing paper green lined 8.5" x 11" (2)
5.679.00	inset paper bulk 6 reams (2)

Mathematics

5.580.00	numerals 0 to 10 (6)
5.583.00	stamp game paper 15 problems (2)
5.585.00	number words and numerals 1-10
5.586.00	beginning math paper (4)
5.595.21	addition tables booklet 1, per 40 (2)
5.595.22	addition tables booklet 2, per 40
5.595.23	addition tables booklet 3, per 40
5.595.24	addition working charts problem slips
5.595.31	subtraction tables booklet 1, per 24 (3)
5.595.32	subtraction tables booklet 2, per 40
5.595.33	subtraction tables booklet 3, per 40
5.595.34	subtraction working charts problem slips
5.595.41	multiplication tables booklet 1, per 40 (2)
5.595.42	multiplication tables booklet 2, per 40
5.595.43	multiplication tables booklet 3, per 40
5.595.44	multiplication working charts problem slips
5.595.50	division tables paper per ream
5.595.51	division tables booklet, per 5 (6)
5.595.54	division working charts problem slips
5.605.00	fraction labels
5.606.00	fraction problems, series 1

Geography

5.500.00	land and water forms, cards
5.501.00	land and water forms, descriptions
5.502.00	land and water forms, command cards 1
5.503.00	land and water forms, labels
5.504.00	land and water forms, command cards 2
5.508.00	world maps 11" x 17"—outlines only
5.509.00	world maps 11" x 17"—political boundaries
5.510.00	world maps 11" x 17"—political with lakes
5.511.00	hemisphere maps and labels set
5.512.00	world unlabeled control map
5.512.10	world labeled control map
5.514.00	Africa outline
5.515.00	Africa waterways
5.516.00	Africa political
5.517.00	Asia outline
5.518.00	Asia waterways
5.519.00	Asia political
5.520.00	Australia outline
5.521.00	Australia waterways
5.522.00	Australia political
5.523.00	Europe outline
5.524.00	Europe waterways
5.525.00	Europe political
5.526.00	North America outline
5.527.00	North America waterways
5.528.00	North America political
5.529.00	South America outline
5.530.00	South America waterways
5.531.00	South America political
5.532.00	U.S.A. map outline
5.533.00	U.S.A. map waterways
5.534.00	U.S.A. map—state boundaries
5.535.00	U.S.A. color location set
5.538.00	parts of the flag matching cards
5.539.00	flag paper
5.540.00	parts of the flag descriptions
5.541.00	naming days and months
5.544.00	Africa labeled control map
5.545.00	Asia labeled control map
5.546.00	Australia labeled control map
5.547.00	Europe labeled control map
5.548.00	North America labeled control map
5.549.00	South America labeled control map
5.550.00	United States labeled control map
5.550.10	Canada labeled control map
5.551.00	Africa unlabeled control map
5.552.00	Asia unlabeled control map
5.553.00	Australia unlabeled control map
5.554.00	Europe unlabeled control map
5.555.00	North America unlabeled control map
5.556.00	South America unlabeled control map
5.557.00	United States unlabeled control map
5.557.10	Canada unlabeled control map
5.558.00	continent labels
5.559.00	Africa labels
5.560.00	Asia labels
5.561.00	Australia labels
5.562.00	Europe labels
5.563.00	North America labels
5.564.00	South America labels
5.565.00	United States labels
5.565.10	Canada labels
5.566.00	Africa country cards
5.567.00	Asia country cards
5.568.00	Australia country cards
5.569.00	Europe country cards
5.570.00	North America country cards
5.571.00	South America country cards
5.572.00	United States country cards
5.572.40	Europe country/capitals set
5.572.50	North America country/capitals set
5.572.70	US states/capitals set

Biology

5.618.00	parts of the human body
5.619.00	parts of the human body paper
5.620.00	animals and their homes
5.621.00	animals and their sounds
5.622.00	animals and their young
5.623.00	animal names
5.624.00	animals and their groups
5.627.00	botany cabinet matching cards
5.628.00	botany cabinet control chart
5.629.00	parts of a leaf
5.630.00	parts of a flower
5.662.00	writing paper blue lined 4.25" x 5.5"
5.665.00	writing paper blue lined 8.5" x 11"
5.669.00	writing paper green lined 8.5" x 11"

Other Materials to Purchase or Find

Practical Life

applicator for shoe polish
aprons, various sizes, fabrics, and colors, and with various fasteners
basins, various colors and shapes
baskets, various sizes and shapes
bowls, various sizes
brass polish, non-toxic
bread pans
brushes:
  hard, for shoes
  pastry
  scrub
  soft, for shoes
  vegetable
  other sizes, shapes, and degrees of firmness
buffer, for shoes
buttons in container
castor or butter pat dish
chalk
chopping knife
cloths, small, various colors
comb for each child
confetti or sawdust in container
containers, different shapes and sizes
container for chalk
convection oven
cotton balls
cutting board
cup and saucer, small
dish, small
dust brush, soft
dust cloths
feather dusters
fingernail brush
flatware
floor cloths, various sizes and colors
folding cloths
funnel
glasses, various sizes
handkerchief
ingredients for making bread, pudding, etc.
markers to indicate plant has been watered
mirrors:
  full length
  vanity
needle
oilcloths, various colors
orange sticks
pails w/ spout & handhold underneath, various colors
paper doilies
paper, large, white
placemats, various colors
plants
pin cushion
pitchers:
  beautiful glass
  heavy metal
  small glass
  two-quart
polish dispenser, small
polish, various kinds, as non-toxic as possible (not to be used by children who still put things in their mouths)
polishing cloths
potato peeler
rice, long grain
scissors
scrub board
shoe polish:
  neutral
  brown
  black
soap
soap dishes, various colors
sponges, small, various colors
spoons, small
tissue
thread
toaster
towels, various sizes and colors
trash bags
trash container
trash receptacle
trays, various sizes and shapes
vases:
  clear
  opaque
  etc.
wall hanging case for combs
wash cloths, various colors
wastebaskets
watering can

Sensorial

- bowl, small
- cups, small
- fabrics
- grains of different kinds
- jars for tasting (10)
- pitchers
- selection of objects for additional mystery bags
- spoons
- towel, terrycloth, small
- trays

Language

- baskets for language cards
- books
- bowl, small (for setup for preparing fingertips)
- boxes:
  - for object box exercises
  - for language cards
  - for preposition exercise
- chalk
- compasses
- erasers for chalk boards
- objects:
  - for object boxes
  - for article exercise
- paper:
  - long slips for writing examples in front of the child
  - pastel colors 5.5 x 5.5 (for metal inset work)
- pencils, regular
- picture sources for language cards
- pitchers, small (for setup for preparing fingertips)
- protractors
- ribbon
- rulers
- towels, terrycloth (for setup for preparing fingertips)
- trays:
  - for setup for preparing fingertips
  - for metal insets
  - for small metal insets
- vase

Mathematics

Note: All baskets, cups, and trays are available from Montessori Services. See Appendix 4 for address.

- baskets for:
  - 4 sets addition problems (put a red rim around the baskets)
  - 2 sets subtraction problems (put a green rim around the baskets)
  - 3 sets multiplication problems (put a yellow rim around the baskets)
  - 2 sets division problems (put a blue rim around the baskets)
  - bead bars for multiplication with bead bars (large basket)
  - memory game of numbers
- bathroom scale in pounds
- bowls:
  - small, for formation of complex numbers with beads and cards
  - to hold 99 units for the changing exercise in the collective exercises (2)
  - 2 large bowls (for up to 50 unit beads) for collective exercises
- boxes:
  - 2 plastic, for 50 units for the collective exercises
  - 4 plastic, to hold small numeral cards (5.580.00) for collective exercises
  - 3 plastic, for fraction labels (5.605.00)
  - 5 plastic, for fraction problems (5.606.00)
  - 1 box for each operation
  - 1 box for a mixed set
- clock stamp, rubber
- clock with gears
- cup for 81 beads for division memorization
- English-measure containers
- English-measure ruler
- English-measure weights, brass
- felt mats for:
  - teen boards
  - ten boards
  - addition snake game
  - subtraction snake game
  - multiplication with bead bars
- ink pad
- markers, washable, for the dot board (black and a color other than green, blue, or red)
- mats, long, for bead chains (26 5 x 1)
- meter stick
- metric ruler
- money, real
- paper:
  - plain
  - quadrille (variety of different-sized squares)
- pencils, regular, for:
  - stamp game
  - dot game
  - bead frames
  - racks and tubes
  - fractions
  - memorization exercises
- pencils, colored, for:
  - red, for division memorization
  - dot game (not green, blue, or red)
- ribbons for:
  - spindle boxes (could also use rubber bands)
  - division with the collective exercises, 18 bows of green, 9 each of blue and red

- rulers, 6-inch, for:
  - stamp game
  - division memorization
- thermometer in Fahrenheit
- tickets, folded problem, 1 set mixed on white cardstock
- trays:
  - 2 large for collective exercises
  - 9 small for division with bows
- yardstick

Geography

- artifacts from different countries
- clay or plasticine
- developing trays, 5" x 7"
- drying cloth
- food coloring, blue
- oilcloth
- pitcher
- pencils, colored:
  - red
  - blue
- spoon

Biology

- animals, live
- aquarium(s)
- aquarium nets, heater, lights, gravel, etc.
- bedding for animals, as appropriate
- books, for additional information
- bowls, various sizes, various materials*
- buckets/pails*
- cage(s) for animals
- cotton, sterile
- fertilizer
- first aid kit*
- flower pots, various sizes and shapes*
- food for various pets and plants in the classroom
- garden soil
- herbarium*
- leaf and flower press*
- leaf specimens
- light source for plants
- magnifying glass
- mini set of gardening tools*
- mister*
- moss, sphagnum*
- newspaper
- paper:
  - black*
  - various colors*
  - plain white*
- paring knife*
- peat
- pebbles
- pencils*
- plants, live
- pottery
- sand*
- saucers or pans on which to set plants
- scissors*
- seeds for planting (corn, beans, etc.)
- specimens, as interest dictates
- stands for plants
- terrarium*
- toothpicks*
- trays—various sizes, shapes, and materials
- vermiculite
- water
- watering can

Music

- pictures of composers
- records—Sanford Jones

Art

- crayons, chalk, colored pencil, and other drawing media
- painting techniques
- clays and other modeling media
- textiles
- paper
- structuring
- printing techniques
- inks and dyes
- carving media
- collage/mosaic materials

Materials to Make

Language

- arrows, black
- charts:
  - sandpaper letters grouped according to similarity of beginning stroke
  - suffixes
  - prefixes
  - word families
  - compound words
  - prepared sentences for reading analysis

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*General supplies, usually not specified in the curriculum outline.

circles:
  red
  black
commands:
  adverbial
  one action, two actions, more actions, etc.
labels for Montessori apparatus
labels for indoor environment
sentences for reading analysis
tickets:
  article exercise
  logical adjective game
  logical adverb game

Mathematics

word problems

Geography

biome folders:
  desert
  forest
  grasslands
  seashore
  tundra
compass directions
earth labels for use with 5.511.00, 5.512.00, 5.512.10
geography folders for each continent:
  First folder (one for each continent) general pictures which show fundamental needs of human beings, flora, fauna
  Second folder (one for each continent, 5 envelopes in each) which give more detail of the above
  Third folder (country in which school is located) general assortment as in the first folder
  Fourth folder (country in which school is located) classified around one topic
  Later, folders three and four may be organized for different countries.
land and water form models: Use earthy-colored clay or plasticine in 5" x 7" developing trays with pouring lips. Do not paint the forms. Make shapes that correspond to the forms in the land and water form cards (item no. 5.500.00).
picture collections:
  islands
  lakes
  peninsulas
  gulfs
  isthmi
  straits
  capes
  bays
  archipelagos
  systems of lakes

Biology

botany cabinet labels
folders with information and pictures:
  animals
  plants
heading cards
labels
nomenclature materials:
  botany
  zoology
picture cards and labels:
  fish
  amphibians
  reptiles
  birds
  mammals
  plants
  living/non-living
  plant/animal
  etc.
text for pictures
Who am I? sets:
  animals
  plants

Music

card material—soon to be available from Nienhuis

Elementary Class Inventory by Curriculum Area

Montessori Apparatus

Language

0.045.A0	detective adjective game
0.046.00	metal insets
0.047.00	metal inset stands
0.054.A0	box for the sandpaper letters
0.054.B4	sandpaper letters, cursive
0.060.A3	small movable alphabet, red, print
0.060.A5	small movable alphabet letters, blue, print
0.060.A7	small movable alphabet letters, black, print
0.060.C2	box for the small movable alphabet (3)
0.061.C1	box for the small printed alphabets (2)
0.061.T0	printed alphabet, blue, print
0.061.T2	printed alphabet, red, print
0.066.00	blank greenboards, set of 2 (order 2 sets)
0.067.00	greenboards with lines and squares, set of 2 (order 1 set)
0.068.00	greenboards, double lined/squares, set of 2 (order 2 sets)
0.102.01	grammar boxes
0.103.01	grammar filling boxes
0.104.01	printed grammar cards
0.104.A0	unprinted grammar cards
0.105.A1	grammar command boxes
0.105.B0	command box in a natural finish (order up to 20)
0.108.01	reading/sentence analysis set
0.108.B1	reading analysis working chart
0.110.00	plastic grammar symbols in box
0.110.50	noun and verb introduction solids
0.110.A0	noun symbol, plastic (2)
0.110.B0	article symbol, plastic (2)
0.110.C0	adjective symbol, plastic (2)
0.110.E0	verb symbol, plastic (2)
0.110.F0	preposition symbol, plastic (2)
0.110.G0	adverb symbol, plastic (2)
0.110.H0	pronoun symbol, plastic (2)
0.110.I0	conjunction symbol, plastic (2)
0.110.J0	interjection symbol, plastic (2)
0.111.00	paper grammar symbols, replacement set (2)
0.111.A0	noun symbol, paper (5)
0.111.B0	article symbol, paper (5)
0.111.C0	adjective symbol, paper (5)
0.111.E0	verb symbol, paper (5)
0.111.F0	preposition symbol, paper (4)
0.111.G0	adverb symbol, paper (4)
0.111.H0	pronoun symbol, paper (4)
0.111.I0	conjunction symbol, paper (3)
0.111.J0	interjection symbol, paper (2)
0.112.50	paper grammar symbols in box
0.112.A0	grammar symbols box with 10 compartments (2)
0.249.00	the farm (may be borrowed from preschool)
1.725.00	farm table (may be borrowed from preschool)
1.735.00	stand for greenboards
7.023.00	box for 14 x 14 cm (5.5" x 5.5") paper (4)
7.201.00	11 dozen inset pencils, 11 colors (3)
7.202.00	dozen red inset pencils (5)
7.203.00	dozen dark blue inset pencils (5)
7.204.00	dozen dark green inset pencils (5)
7.211.00	dozen black inset pencils (5)
7.304.00	holder for 3 pencils (5)
7.305.00	set of 11 colored pencil holders
7.701.00	scissors with rounded point 10 cm (6)
7.702.00	scissors with sharp point 13 cm (6)
7.708.00	six-scissor storage block (2)

Mathematics

0.050.A0	dot exercise sheets, per 50 (2)
0.060.A3	small movable alphabet, red, print
0.060.A5	small movable alphabet, print, blue
0.060.A7	small movable alphabet, black, print
0.060.C2	box for the small movable alphabet (3)
0.069.A0	box for large number cards
0.070.A0	box for small number cards (7)
0.071.C0	small number cards, 1-9000, plastic (7)
0.072.C0	large number cards, 1-9000, plastic
0.073.00	bank game (2 sets)
0.074.10	wooden square, per 10 pieces (5)
0.075.10	wooden cube, per 10 pieces (2)
0.076.G0	45 golden ten bars in box, individual beads, glass (3)
0.077.G0	100 golden bead units, individual beads, glass (with holes) (2)
0.081.00	wooden tray with two unit cups (5)
0.082.00	stamp game (2)
0.086.B0	set of printed arrows for the bead material
0.086.G0	bead material, individual beads, glass
0.087.00	multiplication board set
0.090.AG	colored bead stairs, 10 sets, individual beads, glass
0.091.G0	black and white bead stairs, 5 sets individual beads, glass (for replacement)
0.092.00	addition strip board
0.092.A0	subtraction strip board
0.093.00	small bead frame (2)
0.094.00	large bead frame (3)
0.095.00	long division (2)
0.095.A0	division tube, plastic (10)
0.095.B0	100 green beads with plastic box (2)
0.095.B1	100 blue beads with plastic box
0.095.B2	100 red beads with plastic box
0.096.A0	unit division board
0.097.00	small skittles, per 100

0.099.00	flat bead frame (2)
0.113.00	large fraction skittles
0.113.A0	skittle stand
0.114.00	fraction circles
0.114.A0	fraction circles stand
0.115.00	metal squares—9 plates
0.116.00	metal triangles—4 plates
0.124.00	instrument for the measurement of angles
0.125.00	the centisimal frame
0.129.01	power of 3 cube
0.129.02	one cube, 27 x 27 x 27 cm, painted yellow
0.130.00	power of two cube
0.131.00	binomial cube
0.132.00	trinomial cube
0.132.A0	geometric hierarchy of number
0.132.B0	geometric hierarchy of number cards
0.133.00	small square root board
0.134.01	patterns for square root
0.135.00	algebraic peg board (3)
0.136.00	pegs for algebraic peg board (3)
0.137.01	checkerboard (2)
0.138.B0	number tiles (5)
0.138.G0	checker board beads, individual beads, glass
0.139.01	decimal fraction exercise
0.140.01	decimal fraction board (yellow decimal board)
0.142.A0	addition working charts
0.142.B0	subtraction working charts
0.142.C4	multiplication working charts
0.142.D1	division working charts
0.143.01	subtraction tables
0.144.01	addition tables
0.146.00	addition equations and sums box
0.147.00	subtraction equations and differences box
0.148.00	box of multiplication equations and products
0.149.01	division equations and dividends box
0.153.01	notation paper for the small bead frame (50 sheets) (at least 3)
0.154.01	notation paper for the large bead frame (50 sheets) (at least 6)
0.155.01	multiplication tables
0.157.00	control chart for 100 board
0.157.A0	control chart for the Pythagoras board
0.158.01	division tables
0.180.00	hundred board
0.181.00	Pythagoras board
0.182.01	decimal checker board
0.185.00	cut-out labeled fraction circles, 5 sets
0.186.00	table of Pythagoras
0.187.00	arithmetic trinomial cube
0.188.A0	volume box with 250 cubes (see geometry)
0.189.00	cubing material
0.191.00	decanomial paper
0.192.00	volume box with 1000 cubes
0.195.01	clear plastic envelopes (25) (order as a replacement)
0.195.B0	box for the first set of botany cards (use this one for math)
0.260.00	box with arithmetic signs (3)
0.280.G0	multiplication bead bar layout box, individual beads, glass (2)
0.290.G0	addition snake game, individual beads, glass
0.292.G0	elementary negative snake game, individual beads, glass
0.320.01	first aid kit for math material
0.500.00	bead cabinet castors
1.760.00	bead material cabinet
1.765.00	fraction cabinet
3.100.00	clock with movable hands
3.101.00	clock exercises
7.304.00	holder for 3 pencils (10)
7.701.00	scissors with rounded point 10 cm (6)
OR	
7.702.00	scissors with sharp point 13 cm (6)
7.708.00	six-scissor storage block
9.124.00	10 weights in wooden storage block
9.129.00	small wooden scale
9.500.00	pink touch-up paint
9.500.10	pink touch-up paint (new pink)
9.501.00	red touch-up paint
9.502.00	yellow touch-up paint
9.503.00	green touch-up paint
9.504.00	dark blue touch-up paint
9.505.00	clear touch-up varnish
9.506.00	thinner for repair paint
9.507.00	brown touch-up paint
9.508.00	black touch-up paint
9.509.00	light blue touch-up paint

Geometry

0.024.00	pink tower (borrow from preschool class)
0.024.20	box with cubes for pink tower
0.025.00	brown stair (borrow from preschool)
0.025.20	box with prisms for brown stair
0.037.00	geometric cabinet
0.038.00	demonstration tray
0.039.00	geometric form cards
0.039.A0	geometric form cards for the demonstration tray
0.040.A0	geometric form card box
0.045.00	circles, squares, and triangles
0.045.50	inscribed and concentric figures, plastic
0.045.70	inscribed and concentric figures, paper (2)
0.045.A0	detective adjective exercise
0.048.00	geometric solids
0.048.A0	geometric plane figures with box
0.048.B0	geometric solids basket (2)
0.048.C0	geometric cards
0.049.00	constructive triangles
0.049.F0	constructive blue triangles
0.114.00	fraction circles (see math)
0.114.A0	fraction circles stands
0.115.00	metal squares—9 plates
0.116.00	metal triangles—4 plates
0.117.00	small triangle
0.117.A0	small trapezoid
0.117.B0	small quatrefoil
0.118.00	inscribed and concentric figures, metal
0.119.00	triangle inscribed in circle

0.122.00	equivalent figures material
0.123.00	Theorem of Pythagoras
0.124.00	instrument for the measurement of angles
0.126.00	stand for height (centimeters)
0.126.01	stand for height (inches)
0.127.00	yellow triangles for area
0.128.00	metal volume material
0.188.01	square-based prism—elementary geometric solids
0.188.02	rhombic-based prism—elementary geometric solids
0.188.03	triangular-based prism—elementary geometric solids
0.188.04	set of 2 triangular-based prism—elementary geometric solids
0.188.05	hexagonal-based prism—elementary geometric solids
0.188.06	divided hexagonal-based prism—elementary geometric solids
0.188.07	short square-based prism—elementary geometric solids
0.188.08	short triangular-based prism—elementary geometric solids
0.188.09	square-based pyramid—elementary geometric solids
0.188.10	triangular-based pyramid—elementary geometric solids
0.188.11	cylinder—elementary geometric solids
0.188.12	cone—elementary geometric solids
0.188.13	short cylinder—elementary geometric solids
0.188.14	sphere—elementary geometric solids
0.188.15	ellipsoid—elementary geometric solids
0.188.16	ovoid—elementary geometric solids
0.188.A0	volume box with 250 cubes
0.188.B0	five yellow prisms
0.192.00	volume box with 1000 cubes
0.194.00	geometric stick material (2)
0.194.A0	large working board geometric stick material (2)
0.350.00	Roman arch
1.765.00	fraction cabinet

History

3.100.00	clock with movable hands
3.101.01	clock exercise in box
3.150.00	solaris
5.541.00	naming days and months

Geography & Earth Science

0.105.B0	command box in a natural finish (5)
0.171.01	cabinet of the USA
0.173.01	cabinet of the world parts
0.174.A0	extra flags, yellow
0.174.A1	extra flags, red
0.174.A2	extra flags, green
0.174.A3	extra flags, blue
0.174.A4	extra flags, white
0.177.00	puzzle map of the world parts
0.188.01	square-based prism—elementary geometric solids
0.188.B0	five yellow prisms
0.195.01	clear plastic envelopes (25)
0.195.B0	box for the first set of botany cards (use for geography cards) (10)
0.230.00	globe of land and water
0.231.00	globe of the world parts
0.232.00	flag stand of Asia
0.233.00	flag stand of Europe
0.233.A0	flag stand of North and South America
0.233.B0	flag stand of Africa
0.236.00	puzzle map of USA
1.626.00	map cabinet for 11" x 17" paper maps (4)
2.000.00	flag puzzle of the Americas
3.832.00	flag puzzle of Europe
7.701.00	scissors with rounded point 10 cm (6)
7.702.00	scissors with sharp point 13 cm (6)
7.708.00	six-scissor storage block (2)

Biology

0.041.00	botany cabinet
0.195.00	first set botany cards (2)
0.195.A1	name cards for first set of botany cards (2)
0.195.B0	box for the first set of botany cards (14)
0.195.01	clear plastic envelopes (as many as needed for the nomenclature material)
0.196.00	second set botany cards (2)
0.196.A1	name cards for second set of botany cards (2)
0.196.B0	box for the second set of botany cards (2)
0.197.00	third set botany cards (2)
0.197.A1	name cards for third set of botany cards (2)
0.197.B0	box for the third set of botany cards (2)

Music

0.063.A0	bells set
0.063.B0	bells keyboards (2)
0.063.C0	bells staff board (1)
0.063.D0	bells staff boards (2)
0.063.E1	bells music signs and notes
0.063.F0	bell mallet (3)
0.063.G0	bell damper (3)
0.064.00	bell music strip boards
5.350.00	*Montessori Music: A Guide to Using the Bells*
5.342.00	*Children's Songs*, by Sanford Jones
5.344.00	*Folk Songs*, by Sanford Jones
0.100.A0	tone bars set with two mallets

0.100.A1	tone bar keyboards
0.100.A2	tone bar mallet (5)
1.715.01 & 1.720.02	tone bar cabinet (order 2 of each) (use one cabinet for the bells)

Curriculum Support Materials

Language

5.612.00	detective adjective exercise labels
5.633.00	phonetic flash cards
5.634.00	phonetic pictures and labels
5.635.00	phonetic reading cards
5.637.00	phonogram booklets
5.638.00	phonogram cards
5.639.00	key spelling sorting cards
5.648.00	puzzle words
5.649.10	first books
5.650.00	easy reading booklets
5.651.00	illustrated poems
5.653.00	simple commands set 1
5.654.00	simple commands set 2
5.655.00	grammar games set 1
5.656.00	conjunctions and prepositions
5.657.00	noun labels for the farm
5.658.00	adjective labels for the farm
5.659.00	positive, comparative, superlative
5.660.00	writing paper blue lined, 2" x 8.5" (2)
5.661.00	writing paper blue lined, 4" x 8.5" (2)
5.662.00	writing paper blue lined, 4.25" x 5.5" (2)
5.663.00	writing paper blue lined, 2.75" x 7" (2)
5.664.00	writing paper blue lined, 7" x 8.5" (2)
5.665.00	writing paper blue lined, 8.5" x 11" (2)
5.668.00	writing paper green lined, 7" x 8.5" (2)
5.669.00	writing paper green lined, 8.5" x 11" (2)
5.679.00	inset paper bulk 6 reams (3)
5.680.00	classification of nouns chart
5.681.00	classification of adjectives chart

Mathematics

5.583.00	stamp game paper 15 problems (2)
5.584.00	math function command cards
5.586.00	beginning math paper (6)
5.595.21	addition tables booklet 1, per 40 (2)
5.595.22	addition tables booklet 2, per 40
5.595.23	addition tables booklet 3, per 40
5.595.24	addition working charts problem slips
5.595.31	subtraction tables booklet 1, per 24 (3)
5.595.32	subtraction tables booklet 2, per 40
5.595.33	subtraction tables booklet 3, per 40
5.595.34	subtraction working charts problem slips
5.595.41	multiplication tables booklet 1, per 40 (2)
5.595.42	multiplication tables booklet 2, per 40
5.595.43	multiplication tables booklet 3, per 40
5.595.44	multiplication working charts problem slips
5.595.50	division tables paper per ream
5.595.51	division tables booklet, per 5 (6)
5.595.54	division working charts problem slips
5.600.00	multiple tables (a, b, and control cards) (4)
5.601.00	list of factors tables (c and d) (2)
5.602.00	multiples of numbers tables (2 pads) (6)
5.604.00	one hundred circle paper (2)
5.605.00	fraction labels
5.606.00	fraction problems, series 1
5.607.10	fraction equivalence research sheets

Geometry

5.608.00	geometric cabinet matching cards
5.609.00	geometric cabinet control chart
5.610.00	geometric cabinet labels
5.611.00	geometric cabinet advanced triangle labels
5.612.00	detective adjective exercise labels
5.613.00	commands for geometric cabinet
5.615.00	commands for geometric solids

Geography & Earth Science

5.500.00	land and water forms, cards
5.501.00	land and water forms, descriptions
5.502.00	land and water forms, command cards 1
5.503.00	land and water forms, labels
5.504.00	land and water forms, command cards 2
5.508.00	world maps 11" x 17"—outlines only
5.509.00	world maps 11" x 17"—political boundaries
5.510.00	world maps 11" x 17"—political with lakes
5.511.00	hemisphere maps and labels set
5.512.00	world unlabeled control map
5.512.10	world labeled control map
5.514.00	Africa outline
5.515.00	Africa waterways
5.516.00	Africa political
5.517.00	Asia outline
5.518.00	Asia waterways
5.519.00	Asia political
5.520.00	Australia outline
5.521.00	Australia waterways
5.522.00	Australia political
5.523.00	Europe outline
5.524.00	Europe waterways
5.525.00	Europe political
5.526.00	North America outline
5.527.00	North America waterways
5.528.00	North America political
5.529.00	South America outline
5.530.00	South America waterways
5.531.00	South America political
5.532.00	U.S.A. map outline

5.533.00	U.S.A. map waterways
5.534.00	U.S.A. map—state boundaries
5.535.00	U.S.A. color location set
5.538.00	parts of the flag matching cards
5.539.00	flag paper
5.540.00	parts of the flag descriptions
5.541.00	naming days and months
5.572.40	Europe country/capitals set
5.572.50	North America country/capitals set
5.572.70	US states/capitals set

Biology

5.618.00	parts of the human body
5.619.00	parts of the human body paper
5.620.00	animals and their homes
5.621.00	animals and their sounds
5.622.00	animals and their young
5.623.00	animal names
5.624.00	animals and their groups
5.627.00	botany cabinet matching cards
5.628.00	botany cabinet control chart
5.629.00	parts of a leaf
5.630.00	parts of a flower
1.640.00-1.644.00	1 ea. carpets of different colors or 5 of one color
1.731.00	stand for 3 carpets
OR	
1.732.00	stand for 5 carpets

Other Materials to Purchase or Find

Language

boxes, clear plastic
dictionaries
feather quills (2)
grammar books, one each from several different publishers
house environment
ink blotter, small
ink, packet with 8 bottles of colored inks
inset paper, pastels
paper, roll of adding machine tape or strips of paper
pen holders and nibs
pencils, regular
pens
tray, white

Mathematics

baskets:
  long wicker, for 8" paper strips (Montessori Services)
  assorted sizes and shapes for blank tickets, labels, etc.
bowl (to hold 100 unit beads)
boxes, plastic, for word problems, tickets, etc. (Montessori Services)
cabinets, pull-drawer, for problems
chalk
clock
clock stamp, rubber
colored felt mats:
  15" x 30" 2 yellow, 1 green, 1 blue
  30" x 30" yellow
cups, clear plastic:
  labeled with negative sign (2)
  for green unit beads (1)
envelopes:
  manila, 3" x 5.5" (6)
  manila, 3.5" x 6.5" (20)
  white, 3.5" x 6.5" (2)
felt mats, plain colors:
  yellow
  blue
  etc.
felt squares (3" square):
  red, blue, green, pink, light blue, light green
geography stamps
liquid volume:
  metric containers (1000 ml, 100 ml, 10 ml)
  English containers
felt marker, black, with fine point, to write on clear plastic
meter stick
money:
  USA
  foreign
napkin holders or other holders for envelopes*
newspapers (with exchange rates)
notebooks, small
paper:
  plain
  graph (8.5" x 11" and 22" x 28")
  quadrille, various sizes
pencils:
  regular
  colored
plastic, clear
pull-drawer cabinets, for tickets, labels, etc.
rubber bands, colored
rulers:
  English
  metric
scale, balance with sets of:
  English weights
  metric weights
scales, bathroom:
  pounds
  kilograms
scissors
stacking trays, 9" X 16" (10) for holding various paper*
straightedge

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*General supplies, usually not specified in the curriculum outline.

- thermometers:
  - Celsius
  - Fahrenheit
- trays, for scissors, containers with tickets, etc.*
- yardstick

Geometry

- basket, small wicker
- box, cardboard, 9" x 2"
- carpenter's square
- chalk
- compasses
- construction paper, colored
- crayons:
  - regular
  - fluorescent
- food coloring
- glass to hold soda straws
- glass jar, transparent, large (2)
- newsprint
- paper:
  - graph
  - lined
  - plain, 8.5" x 11"
  - plain, large
- pencil lead for protractors
- pencils:
  - regular
  - colored
- protractors (full circle)
- push pins, different colors
- rulers:
  - various sizes
  - one at least 18"
- sand
- scissors
- soda straws
- tangrams
- tapestry needle
- trays:
  - small, stacking
  - large, shallow
- yarn

History

- artifacts
- blank calendar sheets in three sizes, one page per day
- books for research
- books that give history and meaning of names such as "What to Name the Baby"
- calendar, blank (17" x 22")
- dowel
- fossils
- globe
- glue
- light source
- paper:
  - 5.5" x 5.5"
  - blank
  - large sheets
  - one-inch strips cut from lined paper
  - quadrille
  - roll (adding machine tape)
- pencils:
  - colored
  - regular
- photographs
- pictures
- rubber stamp of clock
- wooden materials for telling time (overlaps with preschool)

Geography & Earth Science

- absorbent pad
- alcohol, denatured
- alcohol, lamp
- aluminum foil
- ammonia**
- antidotes in fixed, unlocked location
- bags, plastic zipper, 10.5" x 11.5"
- baking soda (for experiments and for emergencies)
- balls:
  - ping pong
  - rubber
  - Styrofoam™
- basins of various sizes
- beakers of various sizes (at least 3 of same size)
- books:
  - almanacs
  - encyclopedias
  - atlases
  - etc.
- bottle brushes of various sizes*
- bottle, thin glass
- bowls:
  - foil (3)
  - clear plastic
  - metal
  - glass, large
  - glass with transparent sides
  - Pyrex™ (2)
- boxes:*
  - metal, with hinged cover
  - plastic, clear
  - plastic, clear, circular
  - bread tin
  - clear glass Pyrex™, 4.5" x 8.5"

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*General supplies, usually not specified in the curriculum outline.

**Dangerous chemicals which should be handled only by the teacher.

- bricks (5)
- bucket*
- Bunsen burner and propane
- cabinets:
  - for 11" x 17" paper maps
  - small 10-drawer, for small objects (3)*
- candles
- chalk, white
- chalk powder
- charts:
  - agricultural
  - natural resources
  - etc.
- chemicals, as necessary for experiments**
- clay, in covered bucket
- clock, watch, or oven timer
- clothespins, 3 wooden with one long arm (for holding test tubes)*
- coasters*
- coffee grounds
- containers:
  - plastic, freezer
  - glass, transparent, various sizes and shapes
- cord, extension*
- corks:
  - various sizes, solid
  - various sizes with center hole for tubing
- cotton balls
- cup and saucer*
- cupric sulfate, powdered**
- cups, measuring, $\frac{1}{4}$, $\frac{1}{3}$, $\frac{1}{2}$, 1, and 2 cup capacity*
- cups, Pyrex™ custard, 2 sizes (6)
- detergent, liquid*
- dishes:
  - glass
  - Pyrex™ (4)
  - small metal (3)
- dolls in national costume
- dye
- eraser, rectangular shape
- eye droppers*
- felt:
  - various colors, 18" x 7"
  - various colors, strips
- file boxes for 5" x 8" experiment cards
- first aid box—in fixed, unlocked location*
- flashlight
- flasks of various sizes
- flour
- food coloring, red
- forceps*
- freezer
- funnels of various sizes:
  - clear glass
  - metal
- glass, piece of clear, 6.5" x 12" (tape around the edges)
- glasses:
  - small, clear glass (6)
  - regular size (2)
- globe of world, large
- gloves, disposable, rubber
- glue
- glue stick
- hair dryer
- handkerchief
- honey
- hot pads
- hot plate
- hydrochloric acid**
- incense, sticks
- ink pads
- iron:
  - bar, 12" long, $\frac{3}{8}$" diameter
  - shot
  - filings
  - small piece
  - weight
- jars of various sizes and shapes
- kettle, 3-cup size*
- knitting needle, large
- lamp with bulb, no shade
- lead nitrate**
- lead, shot
- lid, metal paint can*
- felt markers, water base (6 colors)*
- magnets:
  - horseshoe
  - cow
- magnifying glasses
- maps, state in which school is located
- marble chips
- marbles
- mat, heatproof
- matches:
  - fireplace
  - wooden kitchen
- metal covering plate for stove
- metal plate
- molasses
- moss
- nails of assorted sizes
- newspaper
- nuts
- objects:
  - brick
  - clay
  - iron
  - non-iron
  - plastic
  - rock
  - tile
  - wood
- oil, cooking
- pad, heatproof
- pans:*
  - clear glass Pyrex™, 6" x 10"
  - dish
- paper clips

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*General supplies, usually not specified in the curriculum outline.

**Dangerous chemicals which should be handled only by the teacher.

- paper:
  - black
  - graph (quadrille)
  - heavy, for making mountain ranges
  - lined
  - plain, thin
  - small, torn pieces
  - white sheets, 8.5" x 11"
  - white sheets, large
- paraffin
- pebbles
- pencils:
  - regular, at least 2
  - colored
- perfume, bad smelling
- periodic table of the elements*
- pins with colored heads
- pitchers:
  - 2-quart, plastic, no holes
  - 2-quart, plastic, holes with tape
  - glass
  - small
- plants, different kinds:
  - live specimens
  - pictures
- plasticine:
  - small supply
  - in ball shape
- pole in metal base
- pot, small
- prism
- products, natural resources, and raw materials stamps
- refrigerator
- rock, heavy
- rocks, small
- rods, glass, stirring (6)
- salt
- sand (for experiments and for emergencies):
  - in pail with trowel and scoop
  - in different colors
  - clear, high quality
- saucepan, small
- saucers:
  - ceramic
  - plastic (4)
- sawdust
- scale, balance, with weights*
- screen protector for top of burner*
- sheets, heat-resistant for stovetop protection, 17" x 19"*
- silverware tray (4 compartments)*
- slides for microscope*
- slide covers*
- solder, lead
- specimens, rocks
- sponges*
- spoons:
  - soup (2)
  - with slender bowl
  - measuring
  - metal
  - teaspoon
- sprinkling can
- stamp pad, inked
- stand, metal with perpendicular bar, with metal ring attachments*
- Sterno™
- Sterno™ stove
- stoppers*
- stove, small collapsible camp*
- strainer, small*
- sugar
- sulfuric acid**
- table knife*
- tape, mystic*
- teapot
- terra cotta, broken pieces*
- test tubes, Pyrex™ (9)
- test tube holders with space for 6 test tubes (3)
- thermometers
- thermos, wide-mouthed, 3.5" high, 4" diameter*
- thread*
- tongs
- toothpicks
- trays, metal:
  - 12" x 17" (2)
  - 10.5" x 15" (4) cookie sheets
  - 11" x 14" (4)
  - 9" x 12"
  - 5" x 7" (3)
  - with heat-protected top
- tubes:
  - clear plastic
  - shower head at one end, cone shape at other end
  - cardboard, 12" tall, 2.5" diameter with rectangular piece cut from one end
- twine, rough*
- vinegar
- water (for experiments and for emergencies):
  - cold
  - hot
  - room temperature
- watering can
- weights:
  - set for balance scale
  - tied to a string
  - iron
- wood:
  - balsa, all pieces same length and 3 inches wide, but 3 different thicknesses
  - blocks, size of brick (2)
  - boards on which to build models, 18" x 18" (3)
  - broken pieces
  - piece to break
  - plywood 12" x 18"
  - rectangular piece
  - small board

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*General supplies, usually not specified in the curriculum outline.

**Dangerous chemicals which should be handled only by the teacher.

- wood, continued:
  - small flat piece
  - sphere
  - strips, small
  - strips, .25" sq.
  - thin board
- yardstick

Biology

- aquarium(s)
- aquarium nets, heater, lights, gravel, etc.
- bags, clear plastic, zipper
- basket, wire
- bedding for animals, as appropriate
- blotter paper
- books, botany and zoology, for further research
- bowls, various sizes, various materials
- box, file, for botany experiment cards
- buckets/pails
- cabinet, small pull-drawer type for slides, droppers, labels, pins, etc.
- cage(s) for animals
- calcium nitrate**
- cardstock in various colors*
- celery
- coffee cans with lids*
- corkboard*
- cotton, sterile
- dissecting kit*
- ferric chloride**
- fertilizer
- first aid kit
- folders, pocket
- flower pots, various sizes and shapes
- food for various pets and plants in the classroom
- food coloring
- funnel, transparent glass
- garden soil
- herbarium*
- jars and lids, supply of various sizes:
  - 6 identical
  - broad-mouthed
  - small
  - tall
- leaf and flower press*
- light source for plants
- magnesium sulfate**
- magnifying glass
- microscope
- mini set of gardening tools*
- mister
- moss, sphagnum
- newspaper
- nutcracker
- pan, clear glass
- paper:
  - black
  - in various colors
  - plain white
- paring knife
- peat
- pebbles
- pencil
- pictures, different types of roots
- pins, push
- plant stand*
- plants:
  - aquatic
  - variety of live plants
- potassium phosphate**
- pottery, broken bits*
- razor blades, single-edged
- rubber bands
- sand
- saucers or pans on which to set plants
- sawdust
- scalpel
- scissors
- seedlings
- seeds for planting (corn, bean, etc.)
- stands for plants
- stone
- string
- terrarium*
- test tube holder
- test tubes, glass
- tissue
- toothpicks
- trays—various sizes, shapes, and materials
- tweezers
- vermiculite
- water, distilled
- watering can

Art

- carving media
- clays and other modeling media
- collage/mosaic materials
- crayons, chalk, colored pencils, and other drawing media
- inks and dyes
- painting techniques
- paper
- printing techniques
- structuring
- textiles

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*General supplies, usually not specified in the curriculum outline.

**Dangerous chemicals which should be handled only by the teacher.

Materials to Make

Language

- booklets for singular and plural
- card materials
- charts
- circles, about 15 in a box
- clause analysis—2 boxes
- collection of objects of the same kind
- commands
- grammar box contents
- house environment
- labels for Montessori apparatus
- labels for the indoor environment
- pen wipers—circular in shape
- squares, about 30 in a box
- verb materials

Mathematics

- boards for number bases (2)
- charts (handmade):
  - garden chart with 2 pickaxes
  - history of numbers
  - multiple charts
  - squaring and cubing
  - water chart
  - history of measurement (find or make as many as needed for the story)
  - fraction
- crown, silver-colored
- envelopes, 10, containing labeled squares and rectangles for numerical decanomial
- fraction strips, 4 different
- label cards/tickets:
  - binomial cube, algebraic
  - blank
  - changing 1st multiplication control chart to 2nd
  - cubing
  - decimal zero cards for decimal fractions (gray)
  - double zero cards for bank game (gray)
  - factors
  - fractions
  - geometrical representation of the hierarchy of numbers
  - interest, percent
  - measurement
  - metric measures
  - ratio, proportion
  - squaring
  - trinomial cube, algebraic
  - trinomial cube, numerical
  - velocity, distance, time
- numerical decanomial
- paper discs, small, black
- paper forms, sectioned, for division (dividend, divisor, quotient, remainder)
- parentheses
- plastic pieces, clear, with black lines
- problem tickets:
  - fractions: addition, subtraction, multiplication, division
  - special cases: addition, subtraction, multiplication, division
- propeller (to illustrate decimals)
- strips:
  - paper, long white
  - cardboard, black , 4.5" x .5" (11)
  - cardboard, gray, 8.5" x .5" (13)
  - cardboard, 3, and "candelabra" for the yellow decimal board
- word problems:
  - distance, velocity, time
  - divisibility
  - factoring
  - fractions
  - greatest common factor
  - interest, percent
  - lowest common multiple
  - measurement
  - ratio, proportion
  - etc.

Geometry

- area of the circle
- child symbols, 3 pairs
- equilateral cylinder, diameter and height the same
- geometry charts, 61
- hexagons, 3 sizes
- icosahedron (20-sided polygon)
- nomenclature cards and booklets
- paper circles
- paper strips, 1" x 8"
- parentheses
- plane geometric paper figures, different sizes and shapes:
  - circles
  - triangles
  - trapezoids
  - rectangles
  - other quadrilaterals
  - polygons
  - polygons, various types, 3 of each, each 10 times larger than the last
- plumb line
- polygons for the sum of angles
- pyramids made of soda straws with green and white triangles
- quadrilaterals for the sum of angles
- Spirograph™
- stories about geometry
- Theorem of Pythagoras, extra triangles
- tickets:
  - blank
  - white paper, 1" square

tickets, continued:
  - letters, equal signs, addition signs, fraction line
  - formula of the area of a circle

trapezoids
triangles for the sum of angles

History

American history timeline:
- blank chart
- full chart
- movable pieces

card material for one culture
cards for history question charts
Clock of the Eras chart
Fundamental Needs charts
History Question Charts
impressionistic charts for Timeline of Life
Migration Charts
nomenclature materials for Fundamental Needs charts
Original Americans chart (handmade)
strip, black:
- for Black Strip
- for Hand Chart
- for Study of Child's Own Civilization

symbol for division between B.C. & A.D. (or B.C.E. & C.E.)
tickets for history of names
Timeline of Life:
- blank chart
- full chart
- separate pictures and labels

twelve individual months
twelve months on one long strip

Geography & Earth Science

arrows:
- blue
- red

blocks of wood cut to show the movements of faults
bowl, red, drawing
card material, 6 sets
charts, impressionistic, 22" x 28" (approximately 100)
circles
clock symbols (24)
compass directions
earth labels
economic geography folders
ice
ice cubes
labels:
- cities of United States
- on 3" x 5" cards for results of experiments
- for charts
- for mountains
- etc.

maps:
- North America with overlays
- state in which school is located, products of
- study of a nation
- United States, products of

mountains:
- clay, with labels
- paper, cut out, of the United States
- pictures, find and mount

names of the months
nomenclature materials
paper items:
- black strips, circles, spirals
- strips for geography chart: blue, brown, green, pink, red, white
- white strips
- yellow, 3" x 2.5"

physical features of the world (islands, lakes, etc.) marked on maps
pictures, rock formations
river model
smokestack (cardboard tube)
spirals, paper
suns
volcano

Biology

animal folders (e.g., herring gull, sea lion, chipmunk, bald eagle, Gila monster)
animal question cards
botany cabinet labels
box with lid and 2 windows
cardboard tubes for rigid vertebral column and flexible vertebral column
cards:
- botany experiments
- care of plants in class

charts, 22" x 28" (approximately 20)
heading cards
kingdom animalia materials
kingdom vegetalia materials
labels
nomenclature materials:
- botany: Complete nomenclature materials are available for students at AMI elementary courses, or pictures and labels are available from Nienhuis (0.195.00, 0.196.00, 0.197.00); definitions/descriptions need to be handmade.
- zoology: body functions, external parts of vertebrates, paper strips

picture cards and labels:
- fish
- amphibians
- reptiles
- birds
- mammals
- etc.

question cards
text for pictures
tree of life materials
volcano
Who am I? sets

Music

card material—soon to be available from Nienhuis

Specimens–Biology

- algae
- bark
- bee
- branches and/or stems showing:
  - fungi, bracket or shelf
  - twining stem
  - hooked climber stem
  - tendril
- butterfly
- cones, pine
- egg, bird
- ferns
- flowers, variety of
- fruits, variety of
- insects
- leaves, variety of
- lichen
- moss
- mushrooms
- nuts, different kinds
- perishable items, as needed (fruits, vegetables, flowers, etc.)
- plants, live, variety
- roots, variety
- seeds, variety
- shells and other things from the sea
- specimens, plants and animals, preserved
- tree trunk, cross-section

Summary Order for Preschool

Montessori Apparatus

0.001.00	buttoning frame with small buttons
0.002.00	buttoning frame with large buttons
0.003.00	bow tying frame
0.004.00	lacing frame
0.005.00	hook and eye frame
0.006.00	safety pin frame
0.007.00	snapping frame
0.008.00	zipping frame
0.009.00	buckling frame
0.010.00	shoe buttoning frame
0.011.00	shoe lacing frame
0.012.00	Velcro™ frame
0.012.40	smooth gradation board
0.012.A0	rough and smooth boards set
0.014.00	rough gradation tablets
0.014.40	smooth gradation tablets
0.014.50	fabric box
0.015.00	smelling bottles
0.015.50	tasting exercise
0.016.00	sound boxes
0.017.00	baric tablets
0.017.30	mystery bags, empty, set of 2
0.017.40	mystery bags, geometric shapes
0.017.70	mystery bags, familiar items
0.017.A0	blindfold (6)
0.018.00	thermic bottles
0.018.A0	thermic tablets
0.019.00	cylinder block #1
0.020.00	cylinder block #2
0.021.00	cylinder block #3
0.022.00	cylinder block #4
0.023.00	set of knobless cylinders
0.024.00	pink tower
0.024.10	stand for pink tower
0.024.20	box with cubes for the pink tower
0.025.00	brown stair
0.025.20	box with prisms for the brown stair
0.026.00	long rods, red
0.027.00	number rods
0.028.13	sandpaper numerals, USA style, print
0.028.A0	sandpaper numerals box
0.030.03	teen boards, USA style, print
0.030.AG	teen bead box, individual beads, glass (2)
0.031.03	tens boards, USA style, print
0.031.AG	tens bead box, individual beads, glass
0.032.03	spindle boxes, USA style, print
0.032.10	spindles, individual, per 10
0.032.B0	loose spindles box
0.033.03	printed numerals, USA style, print (3)
0.033.A0	printed numerals box (2)
0.034.01	red counters (100)
0.037.00	geometric cabinet
0.038.00	demonstration tray
0.039.00	geometric form cards
0.039.A0	geometric form cards for the demonstration tray
0.040.00	geometric form card cabinet
OR	
0.040.A0	geometric form card box
0.040.A0	leaf cards box
0.041.00	botany cabinet
0.043.00	leaf cards
0.044.00	leaf cards cabinet
0.045.00	circles, squares, triangles for superimposed figures
0.045.50	inscribed and concentric figures, plastic
0.045.70	inscribed and concentric figures, paper
0.045.A0	detective adjective exercise
0.046.00	metal insets
0.047.00	metal insets stands
0.048.00	geometric solids
0.048.A0	geometric plane figures with box
0.048.B0	geometric solids basket (2)
0.048.C0	geometric cards
0.049.00	constructive triangles
0.050.01	dot exercise, framed board
AND/OR	
0.050.50	dot exercise, laminated board
AND/OR	
0.050.A0	dot exercise sheets
0.050.54	water-based pens, black, per 10
0.051.00	first box of color tablets
0.052.00	second box of color tablets
0.053.00	third box of color tablets
0.054.A0	box for the sandpaper letters
0.054.B4	sandpaper letters, cursive
0.056.A0	box for the double sandpaper letters
0.056.B4	double sandpaper letters, cursive
0.057.A0	box for the sandpaper capitals
0.057.B4	sandpaper capitals, cursive
0.058.00	wooden boards
0.059.A3	large movable alphabet, print
0.059.A4	large movable alphabet, cursive (3 sets)
0.059.C1	box for the large movable alphabet, cursive (3 boxes)
0.059.C3	box for the large movable alphabet, print
0.060.A3	small movable alphabet, red, print
0.060.A5	small movable alphabet, blue, print
0.060.A7	small movable alphabet, black, print
0.060.C2	box for the small movable alphabet (3)
0.063.A0	bells set
0.063.B0	bells keyboards
0.063.C0	bells staff board
0.063.D0	bells staff boards
0.063.E1	bells music signs and notes
0.063.F0	bell mallet (3)
0.063.G0	bell damper (2)
0.064.00	bells music strip boards
0.066.00	blank greenboard—2 (order 2 sets)
0.067.00	greenboard, with lines and squares—2
0.068.00	greenboard, double lined/squares—2
0.069.A0	box for large number cards (4)
0.069.C0	large number cards 1-1000, plastic

0.070.A0	box for small number cards (4 or 8)
0.070.C0	small number cards 1-3000, plastic (3 or 6)
0.071.C0	small number cards 1-9000, plastic (1 or 2)
0.072.C0	large number cards 1-9000, plastic (1 or 2)
0.074.10	wooden square, per 10 pieces (5 or 10)
0.075.10	wooden cube, per 10 pieces (2 or 4)
0.076.G0	45 golden ten bars in box, individual beads, glass (3)
0.077.G0	100 golden unit beads, individual beads, glass (with holes) (3)
0.081.00	wooden tray with two unit cups (10)
0.082.00	stamp game
0.086.B0	set of printed arrows for the bead material with boxes
0.086.G0	bead material, individual beads, glass
0.087.00	multiplication board set
0.092.00	addition strip board
0.092.A0	subtraction strip board
0.093.00	small bead frame (3)
0.094.00	large bead frame (2)
0.095.00	long division
0.095.A0	division tubes plastic (10)
0.095.B0	100 green beads with plastic box (2)
0.095.B1	100 blue beads with plastic box
0.095.B2	100 red beads with plastic box
0.096.A0	unit division board
0.097.00	small skittles, per 100
0.108.01	reading/sentence analysis set
0.108.A1	reading analysis, first chart and box
0.110.A0	noun symbol, plastic
0.110.B0	article symbol, plastic
0.110.C0	adjective symbol, plastic
0.110.E0	verb symbol, plastic
0.110.F0	preposition symbol, plastic
0.110.G0	adverb symbol, plastic
0.110.I0	conjunction symbol, plastic
0.111.A0	noun symbol, paper (5)
0.111.B0	article symbol, paper (5)
0.111.C0	adjective symbol, paper (5)
0.111.E0	verb symbol, paper (5)
0.111.F0	preposition symbol, paper (3)
0.111.G0	adverb symbol, paper (3)
0.111.I0	conjunction symbol, paper (5)
0.112.A0	grammar symbols box, 10 compartments (2)
0.114.00	fraction circles
0.114.A0	fraction circles stands (1 set for the fraction circles, 1 set for 0.115.00, and 1 set for 0.116.00)
0.115.00	metal squares—9 plates
0.115.00	metal squares—9 plates (may be displayed on a classroom shelf or on 0.114.A0—order one set for this)
0.116.00	metal triangles—4 plates (may be displayed on a classroom shelf or on 0.114.A0—order one set for this)
0.116.00	metal triangles—4 plates
0.131.00	binomial cube
0.132.00	trinomial cube
0.132.A0	geometric hierarchy of number
0.132.B0	geometric hierarchy number cards
0.142.A0	addition working charts
0.142.B0	subtraction working charts
0.142.C4	multiplication working charts
0.142.D1	division working charts
0.143.01	subtraction tables
0.144.01	addition tables
0.146.00	addition equations and sums box
0.147.00	subtraction equations and differences box
0.148.00	box of multiplication equations and products
0.149.01	division equations and dividends box
0.153.01	notation paper for the small bead frame (50 sheets) (4)
0.154.01	notation paper for the large bead frame (50 sheets) (2)
0.155.01	multiplication tables
0.158.01	division tables
0.176.A0	puzzle maps stand (or 1.740.00 puzzle maps cabinet)
0.176.B0	puzzle map of Europe
0.176.C0	puzzle map of North America
0.176.E0	puzzle map of South America
0.176.F0	puzzle map of Africa
0.176.G0	puzzle map of Asia
0.176.H0	puzzle map of Australia
0.177.00	puzzle map of the world parts
0.179.01	four maps of Europe
0.186.00	table of Pythagoras
0.195.00	first set botany cards (2)
0.195.A1	name cards for first set of botany cards (2)
0.195.B0	box for the first set of botany cards (4)
0.196.00	second set botany cards (2)
0.196.A1	name cards for second set of botany cards (2)
0.196.B0	box for the second set of botany cards (2)
0.197.00	third set botany cards (2)
0.197.A1	name cards for third set of botany cards (2)
0.197.B0	box for the third set of botany cards (2)
0.198.00	botany puzzles
0.199.A0	animal puzzle, horse
0.199.B0	animal puzzle, frog
0.199.C0	animal puzzle, fish
0.199.D0	animal puzzle, turtle
0.199.E0	animal puzzle, bird
0.230.00	globe of land and water
0.231.00	globe of the world parts
0.232.00	flag stand of Asia
0.233.00	flag stand of Europe
0.233.A0	flag stand of North and South America
0.233.B0	flag stand of Africa
0.235.01	cards of the world parts
0.236.00	puzzle map of USA
0.236.B0	puzzle map of Mexico
0.237.00	puzzle map of Canada
0.238.00	four maps of North America
0.239.00	four maps of South America
0.249.00	the farm
0.250.G0	introduction to decimal quantity, individual beads, glass
0.251.00	introduction to decimal symbol
5.500.00	land and water forms, cards
5.501.00	land and water forms, descriptions

0.252.G0	introduction to the decimal system, individual beads, glass
0.260.00	box with arithmetic signs
0.280.G0	multiplication bead bar layout box, individual beads, glass
0.290.G0	addition snake game, individual beads, glass
0.291.G0	subtraction snake game, individual beads, glass
0.320.00	first aid kit for sensorial material
0.320.01	first aid kit for math material
0.500.00	bead cabinet castors
1.626.00	cabinet for paper maps
1.632.00	dressing frames stand
1.640.00	rose carpet (2)
1.641.00	green carpet (2)
1.642.00	blue carpet (2)
1.643.00	gray carpet (2)
1.644.00	beige carpet (2)
1.715.01 and 1.715.02	bell cabinet (order both)
1.725.00	farm table
1.727.00	the complete practical life stand
1.730.00	wall frame for metal insets
1.731.00	stand for 3 carpets (3)
OR	
1.732.00	stand for 5 carpets (2)
1.735.00	stand for greenboards
1.740.00	puzzle maps cabinet (or 0.176.A0 puzzle maps stand)
1.760.00	bead material cabinet
3.100.00	clock with movable hands
3.101.01	clock exercises
4.014.00	shoe polishing brush set, 4 brushes (also included in 1.727.00)

4.015.00	small dust brush
4.033.00	8-piece brassware set
4.042.00	dust brush
5.350.00	*Montessori Music: A Guide to Using the Bells*
5.342.00	*Children's Songs*, by Sanford Jones
5.344.00	*Folk Songs*, by Sanford Jones
5.677.00	scissors exercise (2)
7.023.00	paper box for 14 x 14 cm paper (5.5" x 5.5") (2)
7.201.00	11 dozen inset pencils (11 colors) (3)
7.202.00	dozen red inset pencils (5)
7.203.00	dozen dark blue inset pencils (5)
7.204.00	dozen dark green inset pencils (5)
7.211.00	dozen black inset pencils (5)
7.304.00	holder for 3 pencils (5)
7.305.00	set of 11 colored pencil holders
7.701.00	scissors with rounded point 10 cm (12)
7.708.00	six-scissor storage block (2)
9.124.00	10 weights in wooden storage box
9.129.00	small wooden scale
9.157.00	rubber desktop pad 5.5" x 5.5" (14 x 14 cm) (5) (backing for metal inset paper)
9.500.00	pink touch-up paint
9.500.10	pink touch-up paint (new pink)
9.501.00	red touch-up paint
9.502.00	yellow touch-up paint
9.503.00	green touch-up paint
9.504.00	dark blue touch-up paint
9.505.00	clear touch-up varnish
9.506.00	thinner for repair paint
9.507.00	brown touch-up paint
9.508.00	black touch-up paint
9.509.00	light blue touch-up paint

Curriculum Support Materials

5.502.00	land and water forms, command cards 1
5.503.00	land and water forms, labels
5.504.00	land and water forms, command cards 2
5.508.00	world maps 11" x 17"—outlines only
5.509.00	world maps 11" x 17"—political boundaries
5.510.00	world maps 11" x 17"—political with lakes
5.511.00	hemisphere maps and labels set
5.512.00	world unlabeled control map
5.512.10	world labeled control map
5.514.00	Africa outline
5.515.00	Africa waterways
5.516.00	Africa political
5.517.00	Asia outline
5.518.00	Asia waterways
5.519.00	Asia political
5.520.00	Australia outline
5.521.00	Australia waterways
5.522.00	Australia political
5.523.00	Europe outline
5.524.00	Europe waterways
5.525.00	Europe political
5.526.00	North America outline
5.527.00	North America waterways
5.528.00	North America political

5.529.00	South America outline
5.530.00	South America waterways
5.531.00	South America political
5.532.00	U.S.A. map outline
5.533.00	U.S.A. map waterways
5.534.00	U.S.A. map—state boundaries
5.535.00	U.S.A. color location set
5.538.00	parts of the flag matching cards
5.539.00	flag paper
5.540.00	parts of the flag descriptions
5.541.00	naming days and months
5.544.00	Africa labeled control map
5.545.00	Asia labeled control map
5.546.00	Australia labeled control map
5.547.00	Europe labeled control map
5.548.00	North America labeled control map
5.549.00	South America labeled control map
5.550.00	United States labeled control map
5.550.10	Canada labeled control map
5.551.00	Africa unlabeled control map
5.552.00	Asia unlabeled control map
5.553.00	Australia unlabeled control map
0.024.00	pink tower (borrow from preschool class)
0.024.20	box with cubes for pink tower

5.554.00	Europe unlabeled control map
5.555.00	North America unlabeled control map
5.556.00	South America unlabeled control map
5.557.00	United States unlabeled control map
5.557.10	Canada unlabeled control map
5.558.00	continent labels
5.559.00	Africa labels
5.560.00	Asia labels
5.561.00	Australia labels
5.562.00	Europe labels
5.563.00	North America labels
5.564.00	South America labels
5.565.00	United States labels
5.565.10	Canada labels
5.566.00	Africa country cards
5.567.00	Asia country cards
5.568.00	Australia country cards
5.569.00	Europe country cards
5.570.00	North America country cards
5.571.00	South America country cards
5.572.00	United States country cards
5.572.40	Europe country/capitals set
5.572.50	North America country/capitals set
5.572.70	US states/capitals set
5.580.00	numerals 0 to 10 (6)
5.583.00	stamp game paper 15 problems (2)
5.585.00	number words and numerals 1-10
5.586.00	beginning math paper (4)
5.595.21	addition tables booklet 1, per 40 (2)
5.595.22	addition tables booklet 2, per 40
5.595.23	addition tables booklet 3, per 40
5.595.24	addition working charts problem slips
5.595.31	subtraction tables booklet 1, per 24 (3)
5.595.32	subtraction tables booklet 2, per 24
5.595.33	subtraction tables booklet 3, per 40
5.595.34	subtraction working charts problem slips
5.595.41	multiplication tables booklet 1, per 40 (2)
5.595.42	multiplication tables booklet 2, per 40
5.595.43	multiplication tables booklet 3, per 40
5.595.44	multiplication working charts problem slips
5.595.50	division tables paper per ream
5.595.51	division tables booklet, per 5 (6)
5.595.54	division working charts problem slips
5.605.00	fraction labels
5.606.00	fraction problems, series 1
5.608.00	geometric cabinet matching cards
5.609.00	geometric cabinet control chart
5.610.00	geometric cabinet labels
5.613.00	commands for geometric cabinet
5.615.00	commands for geometric solids
5.618.00	parts of the human body
5.619.00	parts of the human body paper
5.620.00	animals and their homes
5.621.00	animals and their sounds
5.622.00	animals and their young
5.623.00	animal names
5.624.00	animals and their groups
5.627.00	botany cabinet matching cards
5.628.00	botany cabinet control chart
5.629.00	parts of a leaf
5.630.00	parts of a flower
5.632.00	alphabet cards
5.633.00	phonetic flash cards
5.634.00	phonetic pictures and labels (3)
5.635.00	phonetic reading cards
5.637.00	phonogram booklets
5.638.00	phonogram cards
5.639.00	key spelling sorting cards
5.648.00	puzzle words
5.649.10	first books
5.650.00	easy reading booklets
5.651.00	illustrated poems
5.653.00	simple commands set 1
5.654.00	simple commands set 2
5.655.00	grammar games set 1
5.656.00	conjunctions and prepositions
5.657.00	noun labels for the farm
5.658.00	adjective labels for the farm
5.659.00	positive, comparative, superlative
5.660.00	writing paper blue lined 2" x 8.5" (2)
5.661.00	writing paper blue lined 4" x 8.5" (2)
5.662.00	writing paper blue lined 4.25" x 5.5" (2)
5.663.00	writing paper blue lined 2.75" x 7" (2)
5.664.00	writing paper blue lined 7" x 8.5" (2)
5.665.00	writing paper blue lined 8.5" x 11" (2)
5.668.00	writing paper green lined 7" x 8.5" (2)
5.669.00	writing paper green lined 8.5" x 11" (2)
5.679.00	inset paper bulk 6 reams (2)

Summary Order for Elementary

Montessori Apparatus

0.025.00	brown stair (borrow from preschool)
0.025.20	box with prisms for brown stair
0.037.00	geometric cabinet
0.038.00	demonstration tray
0.039.00	geometric form cards
0.039.A0	geometric form cards for the demonstration tray
0.040.A0	geometric form card box
0.041.00	botany cabinet
0.045.00	circles, squares, and triangles
0.045.50	inscribed and concentric figures, plastic
0.045.70	inscribed and concentric figures, paper (2)
0.045.A0	detective adjective exercise
0.046.00	metal insets
0.047.00	metal inset stands
0.048.00	geometric solids
0.048.A0	geometric plane figures with box
0.048.B0	geometric solids basket (2)
0.048.C0	geometric cards
0.049.00	constructive triangles
0.049.F0	constructive blue triangles
0.050.A0	dot exercise sheets, per 50 (2)
0.054.A0	box for the sandpaper letters
0.054.B4	sandpaper letters, cursive
0.060.A3	small movable alphabet, red, print
0.060.A5	small movable alphabet, print, blue
0.060.A7	small movable alphabet, black, print
0.060.C2	box for the small movable alphabet (3)
0.061.C1	box for the small printed alphabets (2)
0.061.T0	printed alphabet, blue, print
0.061.T2	printed alphabet, red, print
0.063.A0	bells set
0.063.B0	bells keyboards (2)
0.063.C0	bells staff board (1)
0.063.D0	bells staff boards (2)
0.063.E1	bells music signs and notes
0.063.F0	bell mallet (3)
0.063.G0	bell damper (3)
0.064.00	bell music strip boards
0.066.00	blank greenboards, set of 2 (order 2 sets)
0.067.00	greenboards with lines and squares, set of 2 (order 1 set)
0.068.00	greenboards, double lined/squares, set of 2 (order 2 sets)
0.069.A0	box for large number cards
0.070.A0	box for small number cards (7)
0.071.C0	small number cards, 1-9000, plastic (7)
0.072.C0	large number cards, 1-9000, plastic
0.073.00	bank game (2 sets)
0.074.10	wooden square, per 10 pieces (5)
0.075.10	wooden cube, per 10 pieces (2)
0.076.G0	45 golden ten bars in box, individual beads, glass (3)
0.077.G0	100 golden bead units, individual beads, glass (with holes) (2)
0.081.00	wooden tray with two unit cups (5)
0.082.00	stamp game
0.086.B0	set of printed arrows for the bead material
0.086.G0	bead material, individual beads, glass
0.087.00	multiplication board set
0.090.AG	colored bead stairs, 10 sets, individual beads, glass
0.091.G0	black and white bead stairs, 5 sets, individual beads, glass (for replacement)
0.092.00	addition strip board
0.092.A0	subtraction strip board
0.093.00	small bead frame (2)
0.094.00	large bead frame (3)
0.095.00	long division (2)
0.095.A0	division tube, plastic (10)
0.095.B0	100 green beads with plastic box (2)
0.095.B1	100 blue beads with plastic box
0.095.B2	100 red beads with plastic box
0.096.A0	unit division board
0.097.00	small skittles, per 100
0.099.00	flat bead frame (2)
0.100.A0	tone bars set with two mallets
0.100.A1	tone bar keyboards
0.100.A2	tone bar mallet (5)
0.102.01	grammar boxes
0.103.01	grammar filling boxes
0.104.01	printed grammar cards
0.104.A0	unprinted grammar cards
0.105.A1	grammar command boxes
0.105.B0	command box in a natural finish (order up to 30)
0.108.01	reading/sentence analysis set
0.108.B1	reading analysis working chart
0.110.00	plastic grammar symbols in box
0.110.50	noun and verb introduction solids
0.110.A0	noun symbol, plastic (2)
0.110.B0	article symbol, plastic (2)
0.110.C0	adjective symbol, plastic (2)
0.110.E0	verb symbol, plastic (2)
0.110.F0	preposition symbol, plastic (2)
0.110.G0	adverb symbol, plastic (2)
0.110.H0	pronoun symbol, plastic (2)
0.110.I0	conjunction symbol, plastic (2)
0.110.J0	interjection symbol, plastic (2)
0.111.00	paper grammar symbols, replacement set (2)
0.111.A0	noun symbol, paper (5)
0.111.B0	article symbol, paper (5)
0.111.C0	adjective symbol, paper (5)
0.111.E0	verb symbol, paper (5)
0.111.F0	preposition symbol, paper (4)
0.111.G0	adverb symbol, paper (4)
0.111.H0	pronoun symbol, paper (4)
0.111.I0	conjunction symbol, paper (3)
0.111.J0	interjection symbol, paper (2)
0.112.50	paper grammar symbols in box
0.112.A0	grammar symbols box with 10 compartments (2)
0.113.00	large fraction skittles
0.113.A0	skittle stand
0.114.00	fraction circles

0.114.A0	fraction circles stand
0.115.00	metal squares—9 plates
0.116.00	metal triangles—4 plates
0.117.00	small triangle
0.117.A0	small trapezoid
0.117.B0	small quatrefoil
0.118.00	inscribed and concentric figures, metal
0.119.00	triangle inscribed in circle
0.122.00	equivalent figures material
0.123.00	Theorem of Pythagoras
0.124.00	instrument for the measurement of angles
0.125.00	the centisimal frame
0.126.00	stand for height (centimeters)
0.126.01	stand for height (inches)
0.127.00	yellow triangles for area
0.128.00	metal volume material
0.129.01	power of 3 cube
0.129.02	one cube, 27 x 27 x 27 cm, painted yellow
0.130.00	power of two cube
0.131.00	binomial cube
0.132.00	trinomial cube
0.132.A0	geometric hierarchy of number
0.132.B0	geometric hierarchy of number cards
0.133.00	small square root board
0.134.01	patterns for square root
0.135.00	algebraic peg board (3)
0.136.00	pegs for algebraic peg board (3)
0.137.01	checkerboard (2)
0.138.B0	number tiles (5)
0.138.G0	checkerboard beads, individual beads, glass
0.139.01	decimal fraction exercise
0.140.01	decimal fraction board (yellow decimal board)
0.142.A0	addition working charts
0.142.B0	subtraction working charts
0.142.C4	multiplication working charts
0.142.D1	division working charts
0.143.01	subtraction tables
0.144.01	addition tables
0.146.00	addition equations and sums box
0.147.00	subtraction equations and differences box
0.148.00	box of multiplication equations and products
0.149.01	division equations and dividends box
0.153.01	notation paper for the small bead frame (50 sheets) (at least 3)
0.154.01	notation paper for the large bead frame (50 sheets) (at least 6)
0.155.01	multiplication tables
0.157.00	control chart for 100 board
0.157.A0	control chart for the Pythagoras board
0.158.01	division tables
0.171.01	cabinet of the USA
0.173.01	cabinet of the world parts
0.174.A0	extra flags, yellow
0.174.A1	extra flags, red
0.174.A2	extra flags, green
0.174.A3	extra flags, blue
0.174.A4	extra flags, white
0.177.00	puzzle map of the world parts
0.180.00	hundred board
0.181.00	Pythagoras board
0.182.01	decimal checkerboard
0.185.00	cut-out labeled fraction circles, 5 sets
0.186.00	table of Pythagoras
0.187.00	arithmetic trinomial cube
0.188.01	square-based prism—elementary geometric solids
0.188.02	rhombic-based prism—elementary geometric solids
0.188.03	triangular-based prism—elementary geometric solids
0.188.04	set of 2 triangular-based prism—elementary geometric solids
0.188.05	hexagonal based prisms—elementary geometric solids
0.188.06	divided hexagonal-based prism—elementary geometric solids
0.188.07	short square-based prism—elementary geometric solids
0.188.08	short triangular-based prism—elementary geometric solids
0.188.09	square-based pyramid—elementary geometric solids
0.188.10	triangular-based pyramid—elementary geometric solids
0.188.11	cylinder—elementary geometric solids
0.188.12	cone—elementary geometric solids
0.188.13	short cylinder—elementary geometric solids
0.188.14	sphere—elementary geometric solids
0.188.15	ellipsoid—elementary geometric solids
0.188.16	ovoid—elementary geometric solids
0.188.A0	volume box with 250 cubes
0.188.B0	five yellow prisms
0.189.00	cubing material
0.191.00	decanomial paper
0.192.00	volume box with 1000 cubes
0.194.00	geometric stick material (2)
0.194.A0	large working board geometric stick material (2)
0.195.01	clear plastic envelopes (75 or as many as needed for the nomenclature material)
0.195.00	first set botany cards (2)
0.195.A1	name cards for first set of botany cards (2)
0.195.B0	box for the first set of botany cards (25)
0.196.00	second set botany cards (2)
0.196.A1	name cards for second set of botany cards (2)
0.196.B0	box for the second set of botany cards (2)
0.197.00	third set botany cards (2)
0.197.A1	name cards for third set of botany cards (2)
0.197.B0	box for the third set of botany cards (2)
0.230.00	globe of land and water
0.231.00	globe of the world parts
0.232.00	flag stand of Asia
0.233.00	flag stand of Europe
0.233.A0	flag stand of North and South America
0.233.B0	flag stand of Africa
0.236.00	puzzle map of USA
0.249.00	the farm (may be borrowed from preschool)
0.260.00	box with arithmetic signs (3)
5.500.00	land and water forms, cards
5.501.00	land and water forms, descriptions

0.280.G0	multiplication bead bar layout box, individual beads, glass (2)
0.290.G0	addition snake game, individual beads, glass
0.292.G0	elementary negative snake game, individual beads, glass
0.320.01	first aid kit for math material
0.350.00	Roman arch
0.500.00	bead cabinet castors
1.626.00	map cabinet for 11" x 17" paper maps (4)
1.640.00-1.644.00	one each, carpets of different colors, or 5 of one color
1.715.01 and 1.720.02	tone bar cabinet (order 2 of each) (use one cabinet for the bells)
1.725.00	farm table (may be borrowed from preschool)
1.732.00	stand for five carpets
1.735.00	stand for greenboards
1.760.00	bead material cabinet
1.765.00	fraction cabinet
2.000.00	flag puzzle of the Americas
3.100.00	clock with movable hands
3.101.01	clock exercises
3.150.00	solaris
3.832.00	flag puzzle of Europe
5.350.00	*Montessori Music: A Guide to Using the Bells*
5.342.00	*Children's Songs*, by Sanford Jones
5.344.00	*Folk Songs*, by Sanford Jones
7.023.00	box for 14 x 14 cm (5.5" x 5.5") paper (4)
7.201.00	11 dozen inset pencils, 11 colors (3)
7.202.00	dozen red inset pencils (5)
7.203.00	dozen dark blue inset pencils (5)
7.204.00	dozen dark green inset pencils (5)
7.211.00	dozen black inset pencils (5)
7.304.00	holder for 3 pencils (5)
7.305.00	set of 11 colored pencil holders
7.701.00	scissors with rounded point 10 cm (6)
OR	
7.702.00	scissors with sharp point 13 cm (6)
7.708.00	six-scissor storage block
9.124.00	10 weights in wooden storage block
9.129.00	small wooden scale
9.500.00	pink touch-up paint
9.500.10	pink touch-up paint (new pink)
9.501.00	red touch-up paint
9.502.00	yellow touch-up paint
9.503.00	green touch-up paint
9.504.00	dark blue touch-up paint
9.505.00	clear touch-up varnish
9.506.00	thinner for repair paint
9.507.00	brown touch-up paint
9.508.00	black touch-up paint
9.509.00	light blue touch-up paint

Curriculum Support Materials

5.502.00	land and water forms, command cards 1
5.503.00	land and water form, labels
5.504.00	land and water forms, command cards 2
5.508.00	world maps 11" x 17"—outlines only
5.509.00	world maps 11" x 17"—political boundaries
5.510.00	world maps 11" x 17"—political with lakes
5.511.00	hemisphere maps and labels set
5.512.00	world unlabeled control map
5.512.10	world labeled control map
5.514.00	Africa outline
5.515.00	Africa waterways
5.516.00	Africa political
5.517.00	Asia outline
5.518.00	Asia waterways
5.519.00	Asia political
5.520.00	Australia outline
5.521.00	Australia waterways
5.522.00	Australia political
5.523.00	Europe outline
5.524.00	Europe waterways
5.525.00	Europe political
5.526.00	North America outline
5.527.00	North America waterways
5.528.00	North America political
5.529.00	South America outline
5.530.00	South America waterways
5.531.00	South America political
5.532.00	U.S.A. map outline
5.533.00	U.S.A. map waterways
5.534.00	U.S.A. map—state boundaries
5.535.00	U.S.A. color location set
5.538.00	parts of the flag matching cards
5.539.00	flag paper
5.540.00	parts of the flag descriptions
5.541.00	naming days and months
5.572.40	Europe country/capitals set
5.572.50	North America country/capitals set
5.572.70	US states/capitals set
5.583.00	stamp game paper 15 problems (2)
5.584.00	math function command cards
5.586.00	beginning math paper (6)
5.595.21	addition tables booklet 1, per 40 (2)
5.595.22	addition tables booklet 2, per 40
5.595.23	addition tables booklet 3, per 40
5.595.24	addition working charts problem slips
5.595.31	subtraction tables booklet 1, per 24 (3)
5.595.32	subtraction tables booklet 2, per 24
5.595.33	subtraction tables booklet 3, per 40
5.595.34	subtraction working charts problem slips
5.595.41	multiplication tables booklet 1, per 40 (2)
5.595.42	multiplication tables booklet 2, per 40
5.595.43	multiplication tables booklet 3, per 40
5.595.44	multiplication working charts problem slips
5.595.50	division tables paper, per ream
5.595.51	division tables booklet, per 5 (6)
5.595.54	division working charts problem slips
5.600.00	multiple tables (a, b, and control cards) (4)
5.601.00	list of factors tables (c and d) (2)
5.602.00	multiples of numbers tables (2 pads) (6)
5.604.00	one hundred circle paper (2)
5.605.00	fraction labels
5.606.00	fraction problems, series 1

5.607.10	fraction equivalence research sheets
5.608.00	geometric cabinet matching cards
5.609.00	geometric cabinet control chart
5.610.00	geometric cabinet labels
5.611.00	geometric cabinet advanced triangle labels
5.612.00	detective adjective exercise labels
5.613.00	commands for geometric cabinet
5.615.00	commands for geometric solids
5.618.00	parts of the human body
5.619.00	parts of the human body paper
5.620.00	animals and their homes
5.621.00	animals and their sounds
5.622.00	animals and their young
5.623.00	animal names
5.624.00	animals and their groups
5.627.00	botany cabinet matching cards
5.628.00	botany cabinet control chart
5.629.00	parts of a leaf
5.630.00	parts of a flower
5.633.00	phonetic flash cards
5.634.00	phonetic pictures and labels
5.635.00	phonetic reading cards
5.637.00	phonogram booklets
5.638.00	phonogram cards
5.639.00	key spelling sorting cards
5.648.00	puzzle words
5.649.10	first books
5.650.00	easy reading booklets
5.651.00	illustrated poems
5.653.00	simple commands set 1
5.654.00	simple commands set 2
5.655.00	grammar games set 1
5.656.00	conjunctions and prepositions
5.657.00	noun labels for the farm
5.658.00	adjective labels for the farm
5.659.00	positive, comparative, superlative
5.660.00	writing paper blue lined, 2" x 8.5" (2)
5.661.00	writing paper blue lined, 4" x 8.5" (2)
5.662.00	writing paper blue lined, 4.25" x 5.5" (2)
5.663.00	writing paper blue lined, 2.75" x 7" (2)
5.664.00	writing paper blue lined, 7" x 8.5" (2)
5.665.00	writing paper blue lined, 8.5" x 11" (2)
5.668.00	writing paper green lined, 7" x 8.5" (2)
5.669.00	writing paper green lined, 8.5" x 11" (2)
5.679.00	inset paper bulk, 6 reams (3)
5.680.00	classification of nouns chart
5.681.00	classification of adjectives chart

Resources

Ordering Documents Listed in Each Chapter s Further Reading from NAMTA

The articles and documents listed in each chapter's Further Reading from NAMTA are available as photocopies. Unless otherwise noted, the price is based on the total number of pages photocopied (see "total pages" in the entries) at $.30 (U.S.) per page, plus shipping (10% in the U.S., 20% in Canada, 45% elsewhere). Minimum order is $5. Prices are subject to change. To order, photocopy the relevant pages from this handbook, highlight or circle the desired articles, and send with check or money order (no credit card orders) to NAMTA, 11424 Bellflower Road, Cleveland, OH 44106, USA. Allow up to three weeks for delivery.

Books

School Organization and Management

How to Put Your Board Together in Ways That Make Sense: The ISM Trustee Guidebook, available from ISM Management Resource Services, 1316 N. Union St., Wilmington DE 19806-2594.

NAIS Trustee Handbook, available from the National Association of Independent Schools, 1620 L Street NW, Washington, DC, 20036.

School Architecture

Reinvigorating Our Schools, publication of the American Institute of Architects, Washington D.C. (800) 365-2724, order #W866.

Music

The Montessori Music Curriculum for Children up to Six Years of Age, dissertation by Jean Karen Miller, available from University Microfilms International, 300 North Zeeb Road, Ann Arbor, Michigan 48106. (800) 521-0600; or 18 Bedford Row, London, WC1R 4EJ, England. Order number 8109598.

Montessori Music: A Guide to Using the Bells, available from Nienhuis Montessori USA, 320 Pioneer Way, Mountain View, CA 94041. (800) 942-8697.

Books by Montessori from ABC-CLIO Ltd.

NAMTA distributes Montessori books from ABC-CLIO Ltd. (Oxford, England). See the current NAMTA catalog or our Web site <www.montessori-namta.org> for prices and shipping costs. The following titles are available:

The Absorbent Mind, by Maria Montessori, trans. Claude A. Claremont.

The Advanced Montessori Method, Vol.1: Spontaneous Activity in Education, by Maria Montessori, trans. Florence Simmonds & Lily Hutchinson.

The Advanced Montessori Method, Vol.2: Materials for Educating Elementary School Children, by Maria Montessori, trans. Arthur Livingston.

Basic Ideas of Montessori's Educational Theory: Extracts from Maria Montessori's Writings and Teachings, compiled by Paul Oswald and Günter Schulz-Benesch, trans. Lawrence Salmon.

The California Lectures of Maria Montessori, 1915: Collected Speeches and Writings, ed. Robert G. Buckenmeyer.

The Child in the Family, by Maria Montessori, trans. Nancy Rockmore Cirillo.

The Child, Society and the World: Unpublished Speeches and Writings of Maria Montessori, trans. by Caroline Juler & Heather Yesson.

From Childhood to Adolescence, by Maria Montessori, based on the 1976 revised Schocken edition.

The Discovery of the Child, by Maria Montessori, trans. M. Joseph Costelloe, S.J.

To Educate the Human Potential, by Maria Montessori.

Education for Human Development: Understanding Montessori, by Mario M. Montessori, Jr.

Education for a New World, by Maria Montessori.

Education and Peace, by Maria Montessori, trans. Helen R. Lane.

The Formation of Man, by Maria Montessori, trans. A.M. Joosten.

What You Should Know About Your Child, based on lectures by Maria Montessori.

Other in-print books by Montessori and about Montessori education can be obtained online through the NAMTA Web site <www.montessori-namta.org> or through your local bookstore. Dates indicate the most recent edition:

Dr. Montessori's Own Handbook, by Maria Montessori. 1988.

Maria Montessori: A Biography, by Rita Kramer. 1988.

Maria Montessori: Her Life and Work, by E. Mortimer Standing. 1995.

Michael Olaf's Essential Montessori: A Guide and Catalogue for Montessori Education from Birth, at Home and at School, by Susan Stephenson. Published annually.

Montessori in the Classroom: A Teacher's Account of How Children Really Learn, by Paula Polk Lillard. 1997.

Montessori in Contemporary American Culture, edited by Margaret Howard Loeffler. 1992.

The Montessori Method, by Maria Montessori. 1989.

Montessori: A Modern Approach, by Paula Polk Lillard. 1988.

Montessori Read and Write: A Parents' Guide to Literacy for Children, by Lynne Lawrence. 1998. Available from NAMTA. See current catalog for price and shipping.

Montessori Today: A Comprehensive Approach to Education from Birth to Adulthood, by Paula Polk Lillard. 1996. Available from NAMTA. See current catalog for price and shipping.

The Secret of Childhood, by Maria Montessori. 1992.

The Spiritual Hunger of the Modern Child, with a chapter by Mario Montessori. 1984.

Recommended Reading from Non-Montessori Authors

The following books offer a Montessori-compatible message for parents and teachers alike. Many of these authors have appeared at NAMTA conferences. Order through your local bookstore or the NAMTA Web site <www.montessori-namta.org>.

Discipline

Beyond Discipline: From Compliance to Community, by Alfie Kohn. 1996.

No Contest: The Case against Competition, by Alfie Kohn. 1992.

Punished by Rewards: The Trouble with Gold Stars, Incentive Plans, A's, Praise, and Other Bribes, by Alfie Kohn. 1995.

Brain Development and Intelligence

Creating Minds: An Anatomy of Creativity Seen through the Lives of Freud, Einstein, Picasso, Stravinsky, Eliot, Graham, and Gandhi, by Howard E. Gardner. 1994.

Endangered Minds: Why Our Children Don't Think, by Jane M. Healy. 1991.

Extraordinary Minds, by Howard Gardner. 1998.

Failure to Connect: Why Computers Are Damaging to Our Children's Minds and What We Can Do about It, by Jane M. Healy. 1998.

Frames of Mind: The Theory of Multiple Intelligences, by Howard E. Gardner. 1993.

How to Have Intelligent and Creative Conversations with Your Kids, by Jane M. Healy. 1994.

Intelligence: Multiple Perspectives, by Howard Gardner, et al. 1996.

Multiple Intelligences: The Theory in Practice, by Howard E. Gardner. 1993.

Your Child's Growing Mind: A Guide to Learning and Brain Development from Birth to Adolescence, by Jane M. Healy. 1994.

Normalization and "Flow" Theory

Being Adolescent: Conflict and Growth in the Teenage Years, by Mihaly Csikszentmihalyi, et al. 1986.

Beyond Boredom and Anxiety, by Mihaly Csikszentmihalyi. 1975.

Creativity: Flow and the Psychology of Discovery and Invention, by Mihaly Csikszentmihalyi. 1997.

The Evolving Self: A Psychology for the Third Millennium, by Mihaly Csikszentmihalyi. 1994.

Finding Flow: The Psychology of Engagement with Everyday Life, by Mihaly Csikszentmihalyi. 1997.

Flow: The Psychology of Optimal Experience, by Mihaly Csikszentmihalyi. 1991.

Talented Teenagers: The Roots of Success and Failure, by Mihaly Csikszentmihalyi, et al. 1993.

Television and the Quality of Life: How Viewing Shapes Everyday Experience, by Robert Kubey and Mihaly Csikszentmihalyi. 1990.

Cosmic Education

Befriending the Earth, by Thomas Berry and Stephen Dunn. 1991.

The Dream of the Earth, by Thomas Berry. 1990.

Growing Up Green: Education for Ecological Renewal, by David Hutchison and Thomas Berry. 1998.

The Hidden Heart of the Cosmos: Humanity and the New Story, by Brian Swimme. 1996.

The Universe Is a Green Dragon: A Cosmic Creation Story, by Brian Swimme. 1988.

The Universe Story: From the Primordial Flaring Forth to the Ecozoic Era, by Brian Swimme and Thomas Berry. 1994.

Organizations

Leading Montessori Associations

American Montessori Society (AMS)
281 Park Avenue South, 6th floor
New York, NY 10010
(212) 358-1250
fax (212) 358-1256
www.amshq.org

Association Montessori Internationale (AMI)
Koninginneweg 161
1075 CN Amsterdam
The Netherlands
www.montessori-ami.org
ami@xs4all.nl

Association Montessori International–USA (AMI/USA)
410 Alexander St.
Rochester, NY 14607
(716) 461-5920
fax (716) 461-0075
usaami3@aol.com

Montessori Accreditation Council for Teacher Education (MACTE)
P.O. Box 278
Oxford, MD 21654
(888) 446-2283

National Center for Montessori Education (NCME)
P.O. Box 1543

Roswell, GA 30077
(770) 613-0055
ncme@mindspring.com

Other Organizations

Independent School Management, Inc.
1316 N. Union St.
Wilmington, DE 19806-2594
(302) 656-4944
fax (302) 656-0647
www.isminc.com

National Association for the Education of Young Children (NAEYC)
1834 Connecticut Avenue
Washington, DC 20009
(202) 232-8777

National Association of Independent Schools (NAIS)
1620 L Street NW
Washington, DC 20036
(202) 973-9700
fax (202) 973-9790
www.nais.org

School and Student Service for Financial Aid
Educational Testing Service
P.O. Box 6657
Princeton, NJ 08541-6657
School inquiry hotline: (609) 771-7770
www.ets.org

Web Sites

American Montessori Society: www.amshq.org

Association Montessori Internationale: www.montessori-ami.org

Independent School Management, Inc.: www.isminc.com

"Legal Survival Guide" for small businesses from Court TV: www.courttv.com/legalhelp/business/

Links to Montessori resources and information: montessori.edu

NAMTA: www.montessori-namta.org

National Association of Independent Schools: www.nais.org

"The Nonprofit FAQ" from The Evergreen State Society, Seattle, WA: www.eskimo.com/~pbarber/npofaq/index.html

Sources for Classroom Materials

AMI-Approved Distributors of Montessori Apparatus:

Kaybee Montessori
7895-K Cessna Ave.
Gaithersburg, MD 20879
(800) 732-9304
fax: (301) 963-2197
KBGonzag@ix.netcom.com

Nienhuis Montessori USA
320 Pioneer Way
Mountain View, CA 94041
(800) 942-8697
fax (650) 964-8162
info@nienhuis.com
www.nienhuis.com

Practical Life Supplies

Michael Olaf
Box 1162
Arcata, CA 95518
(707) 826-1557
fax: (800) 429-8877
Michaelola@aol.com
members.aol.com/Michaelola/Montessori.html

Montessori Services
836 Cleveland Ave.
Santa Rosa, CA 95401
(707) 579-3003
fax: (800) 483-9822
monserv@sonic.net

Furniture

LORD Company
103 Methodist St.
Cecilia, KY 42724
(502) 862-4537
fax: (888) 238-2516
lordequip@aol.com
members.aol.com/lordequip

Long-Range Planning Consultants

Mark Fish
Montessori School of Raleigh
7005 Lead Mine Rd.
Raleigh, NC 27615
(919) 848-1545
fax 919-848-9611

Independent School Management, Inc.
1316 N. Union St.
Wilmington DE 19806-2594
(302) 656-4944
fax (302) 656-0647
www.isminc.com

Architectural Firms with Montessori Experience

Phil Hart
3080 Essex Road
Cleveland Heights, OH 44118
(216) 321-3355

Smith Edwards, Architects
331 Wethersfield Ave.
Hartford, CT 06114
(860) 296-7800

Studio Works
6775 S. Centinela Ave. Bldg. #3
Culver City, CA 90230
(310) 390-5051

Taliesin Architects
12621 Frank Lloyd Wright Blvd.
Scottsdale, AZ 85261-4430
(602) 860-2700

or contact:
American Institute of Architects
1735 New York Ave. NW
Washington, DC 20006
(202) 626-7300 or (800) 365-2724
www.aiaonline.com

Public School Resources

Montessori Public School Consortium (MPSC)
11424 Bellflower Road
Cleveland, OH 44106
(216) 421-1905
fax (216) 421-8193

Public School Montessorian
Jola Publications
2933 N. 2nd St.
Minneapolis, MN 55411
(612) 529-5001
fax (612) 521-2289

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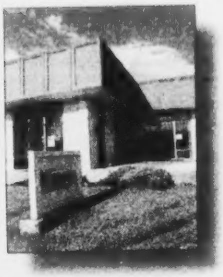

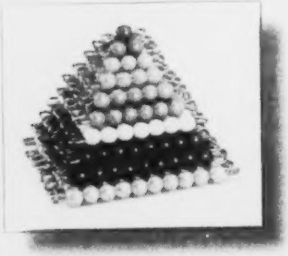

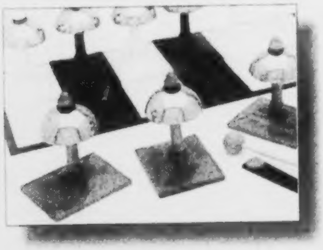

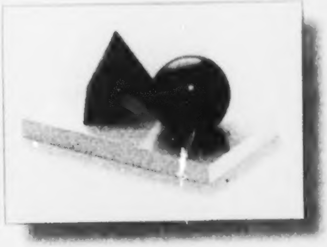

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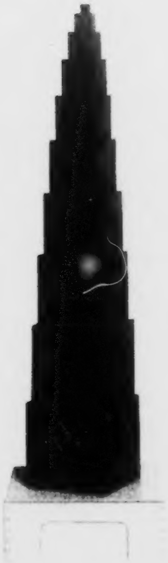

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